 **Minutes**

**Schools Forum**

Notes of meeting on 3rd November 2021

**Members:**

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| Frieda Perry (FP)  | Chair - Primary School rep (Hatfeild) |
| Carole Cook (CC) | 14-19 rep (TRP Ltd)  |
| Phyllis Sternberg (PS)  | Academies rep (Beecholme) |
| Carla Chandler (CC)  | Special School rep (Melrose)  |
| Paul Lufkin (PL)  | Primary School rep (Wimbledon Park) |
| Steve Donegan (SD) | Primary School rep (Malmesbury) |
| Fiona Duffy (FD)  | Primary School rep (Dundonald) |
| Fr Simon Peat (FSP) | Primary Governor rep (St Mary’s) |
| Julia Waters (JW) | Secondary School rep (Ursuline) |

**In Attendance:**

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| Nick Wilson (NW) | LBM CSF - Interim Assistant Director (Safety Valve Programme) |
| Elizabeth Fitzpatrick (EF) | LBM CSF - Assistant Director for Education and Early Help |
| Patricia Harvey (PH) | LBM CSF – Finance |
| Jayne Ward (JW) | LBM CSF – Finance |
| Colette Levingston (CL) | LBM CSF – Finance |
| Allison Jones (AJ) | LBM CSF – Early Years, Family Wellbeing and Early Help |
| Robyn Northcott (RN) | LBM CSF – Note Taker  |

**Apologies:**

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| Kirsten Heard (KH) | Secondary School rep (Raynes Park High School) |
| Hamish Dowlen (HD) | Secondary School Gov rep (Raynes Park |
| Lee Mallin (LM) | Academies Governor rep (Harris Morden) |
| Andrew Good (AG)  | LBM CSF – Finance |

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| **Item 1** | **Welcome and introduction** |
|  | FP welcomed everyone to the meeting and apologies were noted.  |
| **Item 2** | **Minutes from previous meeting** |
|  | The minutes of the meeting held on 28th September 2021 were agreed as a true record of the meeting.  |
| **Item 3** | **Consultation for 2022/23 Schools and Early Years Funding Formulae** |
|  | PH noted that the consultation is modelled on the Autumn 2020 census as the Autumn 2021 census data has not yet been validated. This will be for school budgets for 2022/2023 (from 1st April 2022). The consultation will be sent out to all schools on Friday - PH drew attention to the response form at the end of the consultation for schools to complete and return. 2.1.7 Schools will be asked which funding formula option they would prefer to be used for 2022/23 funding allocation. Option A is a replica of the NFF. Option B is a Local Formula with additional funding through AWPU factors.2.2 MFG PercentageMerton intends to apply MFG at 2%. Schools can put forward a suggested alternative percentage if they would like to. FP asked if this is the best protection for schools to prevent their budget falling as a result of reduced pupil numbers. PH confirmed this. FSP queried what the 2% means. PH confirmed that this means schools will not lose more than 2% from their previous per pupil funding. The Local Authority currently manage items on the de-delegation list. PH noted that it is not possible for individual schools to make their own arrangements for de-delegated items. By de-delegating, this offers the best value for schools. This is only for Local Authority maintained schools, not for academies and free schools. We are only allowed to transfer 0.5% of the total Schools Block in order to increase the High Needs Block. In support of the DSG Recovery Plan Merton proposes to transfer an additional £500,000 (for this year only) from the Schools Block to the High Needs Block in support of the deficit recovery plan, and working in conjunction with the DfE. This would be subject to Secretary State approval.There have been no changes to the proposed Early Years Formula. PH is happy to answer any queries in a separate Teams meeting. PL said that it is important to highlight to schools the significant change in terms of the additional £500k transfer to the High Needs Block. FSP is aware of the increase in SEND expenditure but queried why Merton needs to transfer £500k specifically. FP said that NW’s update on the Safety Valve intervention programme will explain this in more detail.EF noted the timescales in the consultation document and asked if Schools Forum scrutiny of responses is included in the timescales. PH suggested that another Schools Forum meeting would need to be held in early January to look at the consultation outcome.**Action**: RN to change date of Schools Forum meeting from 27th January to take place in week before 21st January.  |
| **Item 4** | **Disapplication Requests** |
|  | PH shared that the key pressures include the drop in census numbers, funding and SEND pressures on schools and national insurance increases. Some other Local Authorities are top-slicing significantly more. PH confirmed that this would be a one-off amount. It is not guaranteed that the Secretary of State will agree to the request.The proforma is currently with Jane McSherry for sign off. PH will share the outcome with Schools Forum when this is received.  |
| **Item 5** | **Any Other Business**  |
|  | **Safety Valve Programme update:**NW provided an update. A briefing meeting took place with Secondary and Special Headteachers yesterday, with sessions scheduled with Primary Headteachers later in the month.The DfE have invited Merton to participate in the Safety Valve Intervention Programme due to Merton having one of the highest cumulative deficits on the Dedicated Schools Grant in the country. There isis an anticipated deficit of £37m by the end of the year. Six other Local Authority areas have been invited to participate in the programme, with five signing up to the programme.There have been two meetings with the DfE so far, and a further meeting is taking place tomorrow. A decision is expected from the DfE by the start of 2022 as to if the deficit will be cleared or if additional funding will be given towards this. There are around 2482 EHCPs in place in Merton. Merton has the 10th largest population of children with EHCPs and the 13th highest SEN Support cohort. Only 37.7% of EHCPs were completed within the 20-week timescale. Merton is the second highest user per-capita in the independent and non-maintained sector. Merton spend £23m a year on independent school places. Merton is also one of the largest net exporter of special school pupils to out of borough provisions. If Merton were to continue on the same trajectory, the DSG and allocation of money to schools would be unsustainable. It is for this reason that Merton has been invited to participate in the Safety Valve programme. Merton has 174 state-funded special school places in the pipeline in the borough but there is still around a 300 place gap. There are 6 areas of focus:* 1. Invest and strengthen school partnerships at school level provision at SEN Support to reduce the year on year growth in the numbers of EHC Plans
	2. Be more effective in how we review:
		1. At an individual CYP level through annual review
		2. At an institutional level, especially where children attend non-state funded schools
	3. Develop alternative placements to reduce dependency on special schools, including high cost non-maintained and independent, and post 16 settings
	4. Plan better for phase transfer.
	5. Review the values of top-up funding.
	6. Put in place a robust monitoring and accountability framework.

EF and JMc are leading the negotiations with the DfE, supported by NW. NW noted that the intervention is for five years and long-term transformative work is requiredPL asked if schools will be required to provide for a greater number of children with complex needs from within the Schools Block rather than the High Needs Block. He also queried if top-up rates would need to be lowered as a cost saving. NW explained that the key strategy is to strengthen support of mainstream and special schools in-borough. The local area has support services available to support schools to enable children to be educated in a mainstream provision in the borough, e.g. health, CAMHS. PL suggested that, with the number of EHCPs already in place, the only way to resolve the issue is for the Schools Block to carry a bigger cost. FP also noted the need to focus on children on SEN Support to prevent the need for an EHCP. Based on the current trajectory, the number of new EHCPs being issued would need to be reduced by 40 - FP noted that this would equate to one EHCP per school. JW shared that colleagues in Sutton have been asked to submit bids for SEN buildings and asked if there has been any learning from experiences of other Local Authorities. NW has been in contact with a number of Local Authorities and it appears that there will be another wave for bidding opened. Merton has the ambition for one special school and six additional ARPs. A request has been made for additional capital to fund this but the response was to repurpose existing capital. JW asked if conversations have taken place with the six schools being considered for an ARP - NW confirmed this. FP asked if schools are invited to nominate themselves if they feel they can accommodate an ARP. NW confirmed that schools can put themselves forward if they would like to. FSP shared concerns that with the range of diagnoses and greater skill in diagnosis, that the demand for support will continue to increase, and that the assessment process will need to be more rigid as a result. NW shared that the DfE are undertaking three reviews. In 2010 when the white paper was presented, the number of children with the complexity of need we are seeing was not anticipated. EF shared that the outcome of the DfE SEND review is expected next year, with a SEND Summit likely to be held in July. EF asked that Headteachers and other members could encourage schools to respond to the consultation as historically, response rates have been low.  |

Date of next meeting: Thursday 13th January 2022, 4pm (rescheduled from Thursday 27th January 2022)