

Schools Forum

Date: 11 January 2024

Time: 8:30 a.m.

Venue: Via MS Teams

Paper

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Public

MINUTES OF SCHOOLS FORUM HELD ON 30TH NOVEMBER 2023 – HELD VIA MS TEAMS**Present****School forum members**

Bill Dowell (Chair)
John Hitchings (Vice Chair)
Caroline Clode – Association secretaries
Andrew Smith – Independent post 16
Shelly Hurdley – Early years
James Staniforth – Post 16
James Pearson – TMBSS
Mark Rogers – Primary Headteacher
Marilyn Hunt - Primary Headteacher
Stephen Matthews - Primary Headteacher
Sue Lovecy – Academy Headteacher
Reuben Thorley – Headteacher
Sandra Holloway – Primary Governor
Sarah North – Primary Headteacher

Members

Kirstie Hurst-Knight

Officers

David Shaw
Jo Jones
Neville Ward
Stephen Waters
Karen Levell
Helen Owen

Observers

Roger Evans
David Vasmer
Gareth Profit
Michelle Dulson

The Chair welcomed all to the meeting, Sarah North from St Mary's school was introduced.

1. Apologies

Apologies had been received from John Boken, Nick Bardsley, Georgia Moss, Sian Lines, Gwilym Butler, Carla Whelan and Mark Cooper.
Reuben Thorley advised that he would have to leave the meeting early.

2. Minutes and Matters Arising (not covered by agenda)

Jo Jones updated forum on the recruitment of new members. Communication was sent out via the weekly email to schools. Interested colleagues were asked to respond via Microsoft forms by 1st December.

Neville Ward commented on work that he is doing with Steve Laycock in the education Psychology team on a piece of work to look at, respond and provide extra help and support to providers that need it.



David Shaw updated forum on the launch of the National Change Program. The launch event took place on the 24th November with Andre Imich, National DfE lead and David Shaw providing the regional/local context. Further information will be provided directly to all school leaders/CEOs and Schools Forum as the programme develops.

3. **Dedicated Schools Grant Monitoring 2023-24**

David Shaw set the context and Stephen Waters presented the paper which was for information only.

- The 2023/24 forecast outturn position for the DSG is a £2.924m in-year deficit.
- This deficit needs to be added to the £2.181m DSG surplus carried forward from 2023-24 resulting in a forecast cumulative DSG deficit of £0.742m.

Mark Rogers commented that although bad news, the forecast felt more in line with how things felt on the ground and using fewer independent providers to save costs is something he supports. He asked where the guidance to parents about independent providers was coming from.

David Shaw replied that there are a number of sources this advice is coming from, that within the local authority they are challenging costly placements and that this matter will be discussed further at a future meeting.

Marilyn Hunt asked is there was a partnership with health in terms of the process of EHCPs.

David Shaw replied that there is an increasingly strong relationship and further work that underway that can be shared at a future forum meeting.

Neville Ward said that language that is used by professionals needs to be looked at so that parents are clearer on what their child needs.

Neville Ward clarified the position regarding early years.

Early Years Block

The forecast outturn position for the Early Years Block is showing a overspend of £0.355m against a provisional budget of £17.868m.

Forecast pressure of £0.360m on the SEND Support against a budget set of £0.600. The final 2023-24 Early Years DSG allocation is published in July 2024.

High Needs Block



The forecast outturn position for the High Needs Block is an in-year deficit of £2.528m against a centrally controlled High Needs Budget of £29.025m. This budget excludes the place funding element of the High Needs Block totalling £9.487m. Forecast Overspend largely relates to Independent Providers budget where the forecast overspend is £2.970m.

The overspend in relation to Independent Special schools and SEN Support services was explained.

Summary

- The council's DSG financial position is forecast to go from a cumulative surplus carried forward figure of £2.181m at the start of the financial year to a cumulative deficit of £0.742m at the end of this financial year.
- The High Needs Block DSG 3-year forecasting exercise undertaken earlier in the year demonstrated that future expenditure growth is likely to outstrip future growth in High Needs Block DSG allocations.
- The 2024-25 provisional High Needs Block DSG allocation (before deductions) has been published. Shropshire's allocation is £41.604m representing a 3.6% increase compared to the 2023-24 allocation of £40.156m. This is less than the 2024-25 national increase to the High Needs Block DSG which is reported as 4.3%
- The 3-year forecast for the High Needs Block DSG is now required as priority given that expenditure in 2023-24 on the High Needs Block is forecast to increase by £7.830m compared to the 2022-23 figure of £34.854m representing a 22% increase, while the funding increase for 2024-25 is provisional only 3.6%.
- The High Needs Block DSG 3-year forecast will be presented to Schools Forum in January 2024.

Andrew Smith commented on the effects of students with increasingly complex needs coming through the system.

Marilyn Hunt asked whether there was a reason that our provisional High Needs Block DSG is less than the national published increases.

Stephen Waters replied that it was something that he would investigate.

Neville Ward added that Shropshire is in a group of the lowest funded local authorities and the rural nature of the county also brings further disadvantages.

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High Needs Pressures (Karen Levell)

Karen Levell added extra context to the paper.

National Context

EHCNA requests up by 23% (2022)

EHC plans increased by 9% (2022)

Proportion of newly issued EHCPs in state funded mainstream schools is 33% (2022)

Local Context

In 2022 new requests increased by 46% (compared to 23% national rate). Further increase by 30% in 2023 so far (Jan-Oct)

EHC Plans increase by 34% (2022/2023)

Proportion of newly issued EHCP in state funded mainstream schools is 24% (2022)

Placement in Independent special schools show an increase of 86 places between 2018/19 and 2022/23.

Actions to Mitigate the High Needs Pressures

Development of the SOAP framework during 2023 – in place from Jan 24

Challenge Partners Peer Review Pilot (6 schools) – commencing Jan 24

Educational Psychology Solutions Circle model pilot (Shrewsbury) – commence Jan 24

Introduction of the Secondary Inclusion/AP Development Fund – Jan 24

Managing Demand for EHCPs

Review of Graduated Support Pathway (GSP)

Review of multi-agency panels (MAPs) through the Change Programme.

Developing the state funded specialist provision

Increased state funded special school places by 25% in the last 18 months (Keystone and Woodlands)

Enabled Woodlands to support CYP who were on route to INMSS and similar activity with Keystone from Jan from 2024

Place Planning review underway from EY- P16 to ensure sufficiency and suitability of location.

Introduction of the Secondary Inclusion/AP Development Fund – Jan 24

David Shaw introduced the AP Development Fund.

Context



David explained the above national rise in exclusion and suspension rates and the increased use of reduced timetables in Shropshire, the costs involved and the detrimental effect on the life chances of a CYP.

Proposal

Introduce a fund to support mainstream schools to reduce the number of permanent exclusions, suspensions and the use of RTTs in each school and increase the attendance rates. Funding will be paid to the central MAT or SAT/maintained school. In return, the Trust and each school recognise that should a permanent exclusion occur, the funding for the subsequent year will be reduced.

Shropshire Council will then redistribute any of the funding reduction for 2023-24 amongst those schools with zero or low permanent exclusions.

Proposal and next steps

Seek views from Schools Forum.

Seek agreement with the Director of Children's Services/Assistant Director of Education to introduce the fund totalling £400,000 from January 2024 covering the Spring and Summer terms – 1st December.

Finalise the methodology to use in consultation with CEOs/Headteachers- 8th December.

Implement Inclusion/AP Development Fund from 1st January 2024

Stephen Matthews enquired whether increased capacity for TMBSS so it could cover all the geographical regions would be something to investigate.

David Shaw said that TMBSS is very important, these suggestions are covering a step before that and would hopefully create capacity in TMBSS and show where more intense support was needed geographically.

James Staniforth enquired whether funding should be distributed with a focus on where the problems are.

David Shaw responded that what James was saying made sense, he also wants to continue to encourage schools that are working hard and achieving no exclusions.

Reuben Thorley pointed out that guaranteed funding is very important as it gets allocated within the school and not put aside in case it is clawed back.

Mark Rogers asked whether this was the claw back that was already operating.

**Schools
Forum
Members**



David Shaw Clarified that the current financial arrangements would continue but this would be for any additional resources.

4. **School Funding Arrangements 2024-25 (Jo Jones)**

Jo Jones presented her paper.

Update to the schools NFF for 2024-2025

DfE announced on 6th October that they had uncovered an error in the initial calculations of the NFF, which means that the overall cost of the core schools budget would be 0.62% greater than allocated.

The revised unit values across the NFF factors are on average of just -1% lower.

The actual primary unit of funding (PUF) and secondary unit of funding (SUF) allocation has also been reduced by -0.93% and -0.96% respectively. The revised figures are £5,224 per pupil (previously £5,273) and £6,314 per pupil (previously £6,375), respectively.

Transfer of Funding between Blocks

In previous financial years 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.



For 2024-25 due to increased cost pressures within the High Needs Block it is our intention to transfer up to 0.5% of the Schools Block budget into the High Needs Block. Modelling work undertaken by the LA using October 22 census data shows there is a possibility of a £200k balance available to transfer to the high needs block. However, once we get the updated October 23 census data this could change due to the number of pupils eligible for the different factors.

Transfer of Funding between Blocks

Due to the expected large deficit on the High Needs Block, Schools Forum are asked to discuss if we need to adjust funding to schools so we can transfer the full 0.5%. More accurate information will be available in early January once we have received the APT with the updated census information and entered the relevant information.

Vote

It was recommended that a vote on this was postponed until a special forum meeting on 11th January 2024 once there is more accurate information.

The Chair agreed with the recommendation of postponing the vote.

Affordability of the Funding Formula

Shropshire's 2024-25 PUF is £5,224 and SUF is £6,314. It will be known whether the overall cost will be affordable from within the 2024-25 Schools Block allocation once the local formula is run using the October 2023 census data.

The modelling is showing that following the NFF should be affordable, and all schools will hopefully be funded in line with the latest NFF factors.

To ensure affordability (or to transfer the maximum 0.5% to High Needs), a reduction to the factor values may be required. Modelling on reducing the basic entitlement factor to free up 500K of funding shows we would need to reduce the factor value by 0.4%.

This would see reductions in school budgets from -£313 to -£28,395 with 21 schools seeing no reduction as they are topped up to the minimum per pupil funding levels.

We have also been modelling the impact of using the cap and scale factors to ensure affordability. Capping and Scaling cannot



take a school below the minimum per pupil funding levels and cannot be applied to new and growing schools.
The modelling shows to free up 500k of funding, the capping and scaling would see reductions in budgets from -£133 to -£25,000
21 schools would have no reduction as they are subject to MPPL.

Vote

It was recommended that a vote be postponed until a special forum meeting on 11th January 2024 once there is more accurate information.

Various scenarios will be presented to Schools Forum for final discussions and decisions at this meeting once updated data is available.

Mark Rogers Commented that his preference regarding funding would be to fund the formula first and then to give additional funding to SEN first.

5.

Consultation on the Central Retention of Dedicated Schools Grant from April 2024

Jo Jones presented her paper and votes were held for several areas:

Pupil Growth Contingency (Primary Schools)

Maintained primary school representatives approved the decision to de-delegate funding from maintained primary school budgets for a pupil growth contingency for maintained schools to £50,000 in 2024-25

Maternity

There was discussion amongst Forum Members about how Shared parental leave is affecting schools, Mark Rogers shared his schools experience of this and the financial implications.

Maintained school representatives approved the recommendation that the Maternity Budget will cover the 'full pay' element of Shared parental leave in 2024-25.

Maintained school representatives approved the recommendation to de-delegate funding of £250,000 from maintained primary and secondary school budgets for a centrally managed maternity budget in 2024-25.

Trade Union Duties



Maintained school representatives approved the recommendation to de-delegate funding of £25,000 from maintained primary and secondary school budgets for a centrally managed trade union duties budget in 2024-25.

School Improvement

Maintained school representatives approved the recommendation to de-delegate funding from primary maintained schools for a centrally managed school improvement budget in 2024-25.

Redundancy fund

Maintained school representatives approved the top-slicing of funding from maintained primary and secondary school budgets in 2024-25, based on maintaining the redundancy fund at £150,000.

Statutory School Finance

Maintained school representatives approved the top-slicing of funding for a statutory school finance budget from maintained primary and secondary school budgets in 2024-25, based on an estimated unit value of £3.11 per pupil.

Statutory Human Resources and Health and Safety

Maintained school representatives approved the top-slicing for a centrally held statutory HR and health and safety budget from maintained primary and secondary school budgets in 2024-25, based on a unit value of £6.45 per pupil.

Education Access Service

Maintained school representatives approved the top-slicing of funding for a centrally held budget for EAS from maintained primary and secondary schools in 2024-25, based on a unit value of £18.66 per pupil.

Mark Rogers asked whether the package was ready to go.

Jo Jones replied that it wasn't.

Mark Rogers stated that he feels that the education access service is ready to move to a traded package.

Davis Shaw agreed that it was time to move it to a SLA basis and said that we would probably be at that stage next year.



6. **Central Schools Services Block 2024-25**

Stephen Waters presented his paper and votes were held for several areas:

Historic commitments:

Termination of employment costs

- Maintained and academy school representatives agreed 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 2023-24.

Prudential borrowing costs

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

Ongoing responsibilities Approval:

School Admissions

- Maintained and academy school representatives agreed to the increased charge of £282,330 for the provision of a School Admissions Team.

Servicing Schools Forum

- Maintained and academy school representatives agreed to the budget of £10,000 for the servicing of Schools Forum.

Copyright Licenses

- Maintained and academy school representatives agreed to the increased charge of £276,700 for the annual copyright licensing fees.

Ongoing Responsibilities that local authorities hold for all schools.

- Maintained and academy school representatives agreed to contribute £816,137 to ongoing responsibilities that the local authority provides for maintained schools and academies as per the detail of these costs outlined in Appendix D of the report to Schools Forum.



7. **Communications**

- The chair confirmed that the work of the f40 is continuing. David Shaw undertook to share recent communications from f40 with Schools Forum.
- Neville shared his concerns about miscommunication about the new early years funding rates from the DfE to Parents and News agencies. Kirstie Hurst-Knight offered to bring the matter up with a meeting with Shropshire MPs.
- The chair reiterated the importance of the Schools Forum and of the meeting on January 11th.

8.

Future meeting dates

Thursday 11th January 2024
Thursday 25th January 2024
Thursday 14th March 2024
Thursday 13th June 2024

The meeting closed at 9:50 am.

