

Meeting title	SCHOOLS FORUM
Date	Tuesday 17 th May 2022 – via Teams
Forum Members Present	Jo Marsh (Chair), Jo Stoling, Kevin Burnett, Louise Malik, Roz Lambert, Steven Mackay, Zoe Davey, Alun Williams
Forum Members Not Present	Claire Hudson (Diocese Boards) Claire is replacing Coleen as Forum rep Claire Crowther, Cllr Dine Romero, Emily Massey, Dawn Sage
Observers	
Officers Present	Christopher Wilford, Philip Frankland, Richard Morgan, Rosemary Collard, Jo Hobbs (notes), Mary Kearney-Knowles
Officers Not Present	
Distribution	As above plus Theresa Gale: Education Director, Diocese of Bath & Wells Cllr. Richard Samuel: Cabinet Member Resources Cllr. Kevin Guy: Leader of the Council Cllr. Vic Pritchard: Chair of PDS Panel Mandy Bishop, Wendy Jefferies, Andy Rothery, Jeff Wring, Paul Hiscott, Olwyn Donnelly
Next meeting	28 th June 2022

1. Apologies Received	ACTION
JM welcomed everyone to the meeting and apologies were noted as above. RM confirmed that the meeting was quorate. RC informed JM that she had to leave the meeting at 2pm.	
2. Declarations of Interest	
No declarations were made.	
3. Minutes of the last meeting (1st Feb 2022)	
LM confirmed that she was attending Schools Forum as a replacement for Gary Lewis (rather than in addition to) and therefore his name can be removed from the apologies section of the last set of notes. KB asked for an update on page 2, re Schema and questions around how the meeting went on 2 nd March with OD and MATs. CW and JS confirmed that the meeting did go ahead on the 2 nd March. They are making progress and meeting to look at collaboration around MATS and SEND CPD and what different groups are doing and what different types of training are being put together. This will go into a central place for local SENCO's, but it is still a work in progress at the moment.	RM

	<p>KB asked a question regarding item 4 budget; is 1.4% over coming years still regarded as a good increase with inflation? RM replied to confirm that that sentence should come after the following sentence to reiterate that this is an additional increase that schools can expect in the coming years. It is good news rather than a good increase. RM to amend the notes to clarify.</p> <p>PF updated regarding his action to help Dine write a letter to go back to the DFE about EY funding. PF confirmed that this has been done, but not heard back from Dine as to whether a reply has been received. CW has been in a meeting with Dine, so will join this meeting late if possible.</p> <p>Minutes accepted as a fair representation. – subject to RM’s clarification change.</p>	RM
4.	Budget Update 2021-22 Outturn	
	<p>RM presented paper to provide an update on the DSG deficit budget position. The draft appendix attached, shows that deficit has increased by £8.013m, relating to high needs budget pressures. This is in draft at the moment, so may move slightly. DSG deficit is likely to be £13.4m as we start 22/23.</p> <p>KB asked RM to explain on page 2 says underspend of £274k reflecting specific occurrences as follows:</p> <ol style="list-style-type: none"> 1. An underspend on the growth fund process. This element of funding was underspent by £274k. This is partly due to 2 specific issues. Firstly, a slow down in the growth of pupils in schools particularly in the primary sector. Along with a larger allocation of funding from the DFE due to the lagged approach to the growth funding allocation. 2. Rates bills of schools converting to academies produced a saving of £61k 3. These savings were offset by specific one off issues relating to excluded pupils and accruals for rates. <p>RM confirmed that the overall DSG schools underspend of £274k is made up of 3 sets of items. Large underspend on growth fund allocation £274k, further saving of £61k, then offsetting items which also amounted to an overspend of £61k. Overall position £274k underspend on schools. This partly offsets the overall DSG deficit.</p> <p>KB asked whether the underspend on schools, has to go towards the high needs deficit / overall DSG deficit? RM clarified for the DFE as long as allocated growth fund is allocated appropriately, if there is an underspend, that should contribute to overall position.</p> <p>LM – any feedback from colleagues in other LA’s as to B&NES position? RM will pick up in next agenda item.</p>	

	JM thanked RM for presenting this paper.	
5.	DSG Deficit Management Plan	
	<p>RM talked through the presentation, which was used to present to Council Corporate Management Team to set the scene as to what is evolving.</p> <p>The high needs budget shows a deficit of £13.4m. The build up of that pressure over last 4 years is shown in slide 1, 2018-19 £20k surplus, 19-20 £1.25m. As covid started there was a significant increase of pressures which has grown the deficit significantly. Partly covid, partly increased demand.</p> <p>Slide 2, Summary of High Needs pressures. The demand in Jan 2019 was 1277 EHCP's, compared to Jan 22 1790 EHCP's. This is a 40% increase in number of EHCP's. Funding from DFE has risen substantially but only by 20% over same period. This has impacted on B&NES significantly.</p> <p>Slide 3 Safety Valve. DFE have published 14 agreements with other LA's. B&NES sits (in south west) just below average. Deficit is significant. South Glos and Dorset have entered into Safety Valve agreement. Discussion taking place with those colleagues to understand process and ask what is going to happen as part of the process.</p> <p>CW reiterated that the growth has been significant. Met with DFE on 10th May and formal entry into Safety Valve will be Sept 2022. Meeting was to understand what our issues are. CW suggested looking at link on slide 3 for further information. We have to set out a plan by end of financial year to show how we are going to balance the budget over 5 years.</p> <p>Slide 4, What have we done to date?</p> <ul style="list-style-type: none"> • Established a high needs budget group through Schools Forum in 2017 • Reviewed all lines of spend and stopped non statutory spend • Reviewed statutory guidance and reviewed thresholds • Introduced a new finance banding system for all EHCP's • Established clear data and analysis • Developed a SEND Capital Plan • Rolled out a SEND Education Strategy <p>Challenge from DFE is how we start to illustrate this in savings. RM and RC working on this.</p> <p>First draft of our plan needs to be given to DFE in the next 3 weeks.</p> <p>Slide 5, Things we need to do by September. Already done a lot of work on this. We have a higher than average number of EHCP, national</p>	

average is 3.9%, B&NES are at 4.2%, higher than south west average, but we are in line with Wiltshire and Swindon.

KB – is the amount of work that needs to be done on capital spend (done work on SEND Approach) or revenue spend or both?

CW – a bit of both but capital work takes longer. And continue to do work around Early Help and SEND support. Mixture of both

SEND education strategy which came to this group a few years ago, it starts off saying that financial turn around will take 5 – 10 years.

KB asked if MATS can help? Is there anything that together through SSB that things can be done that benefits everyone? Or just an LA thing?

CW confirmed that MATS can help, this is not just an LA thing. We need to get the number of requests that B&NES has down. LA only maintain 7 schools. There is a willingness from MATS to help.

RC added that she will need input from MATs on capital spend.

SM asked RM to clarify if the deficit is created by expensive placements out of county?

RM confirmed there are 2 main thrusts which has built up the deficit. Large increase in number of EHCP's 40% over 4 years, specifically in special schools and joint agency pool spending which has increased by 200% over that period. That increase in spending is significant. Capital Strategy to create more local provision.

SM – the level of overspend from those areas in this year alone, how will that money be saved on a year by year challenge, what is the indication of increased resources coming from DFE?

RM – DFE have indicated that in 22-23 they have put in an additional £3.2b additional resources. That equates to 12.7% increase for B&NES. Going forward unlikely to receive these increases for next 4 – 5 years. Should be building in 5% next year, 3% for future years. We have to demonstrate what our expected spend and expected income are over next 5 years.

LM – Any conversations with DFE as to how they are going to fund these contributions e.g. first come first served, or only a portion available?

RM – nothing confirmed from DFE. DSG deficits are over £1b at the moment. They are rapidly entering Safety Valve agreements with a number of authorities.

JM – Slide 4 says Established clear data and – when will this data be available?

RM confirmed that we have data as to where we are now. The challenge is how to predict going forward. DFE have provided

	<p>spreadsheets to predict how much we will spend and the number of cases that will exist. We currently have 1790 EHCPs, been looking at how to predict these numbers going forward so we are creating a set of scenarios. We are looking to gather the data we currently have and will create a set of scenarios, eg a 3% increase, and look at what the impact would be, and what it would look like with a 5% and 10% increase, and will pitch these to DFE as part of Safety Valve programme. June 10th deadline to submit paper. Safety Valve starts in September.</p> <p>RM – slide 5 says Identify agreed possible areas of savings and agree with Schools Forum (invest to save ideas which may create a saving in 3 – 5 years time). Ideas from MATS and individual schools, critical to a possible success. Will be a significant part of agenda planning for Schools Forum going forward.</p> <p>JM thanked RM for presenting this paper.</p>	
6.	Special Premises factors	
	<p>RM updated – following the cancelled March Schools Forum meeting, the DFE highlighted part of our programme that we had not agreed change to Special Premises Factors (High Littleton and Farrington Gurney schools). We should have done a formal consultation and bring back to Forum and agree.</p> <p>RM sent out a virtual request for comments and approval so case could be presented to DFE for 22-23. DFE agreed that this could continue for 22-23 but would need to do a formal consultation on 23-24. Paper is setting out consultation paper for the autumn.</p> <p>Action – agree that the item will require further consultation later in the year.</p> <p>KB asked RM to clarify on page 2, are the payment top slices before schools allocation?</p> <p>RM – DFE formally take the disapplication requests which means that these 2 schools need to have £15-16k between them. DFE would build that into the national funding formula. If we hadn't got approval for this, they would have got less resource, but the money would not have been shared out between other schools.</p> <p>JM thanked RM for presenting this paper.</p>	
7.	Pupil Growth Budget	
	<p>RM presented paper. Funding growth programme – at the moment DFE allocate money to LA to utilise as part of pupil growth. Where we need to grow additional places in mainstream schools, there are a set of policies that set out our proposals. Paper is suggesting to increase the allocations by the same percentage rate of inflation as the rest of the schools 3.01% increase. Suggestion to allocate the resources to</p>	

schools based on the current methodology for 22-23 which is based on the demand required by LA. Then allocate the sum of money (as per appendix) to increase by 3%.

KB asked RM for the current methodology used for setting up and newly formed classes/schools, does the current system work? Or are we short or giving too much?

RM suggests that our mechanism is easy to understand. If a school is contacted by LA to increase planned intake, they will be informed of the funding which will be easy to understand and transparent.

DFE plan to use estimates in the future which will feed the national funding formula. With the current methodology, Schools will see what they are going to get and they will get it. RM has observed that some schools will get an additional allocation but may take on less pupils. They are in theory getting additional resources, but they may require additional staff even just for a small number of pupils.

AW has been in receipt of funding from LA which has been welcomed. Also been part of DFE estimates system.

The school's forum is asked to agree the 3% increase in funding values for LA Planned Growth allocations for FY2022-23.

6 in favour

0 against

0 abstention

RM informed that the DFE are planning to amend the way the pupil growth is allocated to LA's. The DFE's plan is to utilise the estimated pupil numbers that individual schools will put forward as part of pupil growth fund mechanism. LA have been able to do this for the last 5 – 6 years. Individual schools will put forward estimated growth in pupil numbers, if pupil numbers don't come forward there will be a claw back system in future years. Should we as a LA in 23-24 move to this mechanism? More guidance from DFE to come out in Summer and will be part of Autumn consultation.

KB would like to stick with original B&NES plan at the moment.

RM confirmed that quite a few LA's also do it the way that we do it. On a national basis, the DFE would not be able to do it this way. Our schools will need to get used to this way as it will be used in the future.

KB – if a school is going to take on additional pupils, if we already have a good mechanism, would be good to keep this for as long as we can.

LM agrees with KB. Would be good to keep schools up to date though so they are aware of changes that will be coming along.

AW agrees that we should keep B&NES mechanism for as long as we can.

JM thanked RM for presenting this paper.

8.	A.O.B.	
	<p>Supporting Ukrainian Pupils – Early Years. No information available yet. Will be shared when possible. LM has been making representations to get clarity about the funding. Will the funding be pro-rata'd for the remaining of the year? Some pupils in year 6 will only be with the school for a couple of weeks before moving onto secondary school.</p> <p>RM confirmed that education resources for the LA have been received but haven't had how we are meant to use that (no guidance/regulations) and how we allocate it to the priorities that exist. Waiting for further details from DFE/Treasury.</p> <p>CW received letter confirming guidance had been updated but when checked, nothing had been added.</p> <p>AW shared that a Ukraine sponsor commended B&NES on their support.</p> <p>AW asked if there had been any discussion on the cost of energy, and/or contact from ESFA about energy prices? Energy price increase for the Trust is £2.6m next year, taking the energy total to £5.1m across Trust next year.</p> <p>RM confirmed that the LA is observing similar increases across the board as energy contracts are increasing which is causing significant concerns across LA. No specific guidance received from DFE or any Government advice for Local Government.</p> <p>KB – Free Schools Meals and increase in food costs. Any representations from Schools Forum on this topic?</p> <p>LM feels that Schools Forum should be making representations. To note that schools have received other supplementary funding for NI and other costs (teacher pay) so this may be the response received.</p> <p>AW has found a salary sacrifice scheme which he will share with the group.</p> <p>SM – if there is going to be a letter from Schools Forum, would like this to include energy costs, inflation on services and supplies, but also increased pressure on schools for support staff jobs. Schools are having to increase the salaries to make them for competitive (eg site staff).</p> <p>RL echo SM thoughts. Similar in Early Years. Some settings are having to reduce the number of children due to staffing shortages.</p> <p>PF – 1 provider having to pay £1000 signing on bonus for any new roles at the moment. A number of providers will be reducing the number of places available from September.</p> <p>JS – completing a national survey on recruitment of teaching assistants.</p>	<p style="text-align: center;">AW</p>

	<p>Action for RM and PF to write a letter to Minister with JM on behalf of Schools Forum.</p> <p>Action to discuss at Schools Standards Board the need to look at putting an action group together to look at TA recruitment.</p> <p>KB suggested to also utilise MPs and ask there to be a question in parliament.</p> <p>AW will raise with Baroness Baron during forthcoming meeting.</p> <p>JM confirmed that meeting dates for the new academic year will be shared at the next meeting. The December or January meeting will be in person, with the other meeting dates continuing online.</p> <p>JM thanked all for attending.</p>	<p>RM/PH/ JM</p> <p>CW</p>
9.	Date of next meeting	
	28 th June 2022	