



Minutes

Name of meeting	SCHOOLS' FORUM
Date and time	Thursday, 24 March 2022
Venue	Webinar – Virtual Meeting
Present	Beverley Gilbert – Brading CE Primary (Chair) Steve Fairclough – Brighstone CE Primary Gordon Kendall – Bembridge CE Primary School Caroline Sice – Lanesend Primary Academy Sarah Hussey – Northwood Primary Academy Samantha Rooney – Isle of Wight College Jayne Hill – Niton Pre-school and Brighstone Pre-school Julie Stewart – Medina House School Jackie Boxx – Island Learning Centre
Officers	Brian Pope – Assistant Director, Education and Inclusion Barry Downer - Senior Finance Business Partner Irina Rowan – Finance Business Partner Cllr Debbie Andre – Lead Councillor for Children’s Services and Education Diane Hiscock – Clerk
Apologies	Lisa Nicholson – Haylands Primary Mike Hayward – Isle of Wight Education Federation Kevin McDermott – Christ the King College Suzanne Smith – Assistant Director, Access, Resources and Business Development

1. WELCOME AND INTRODUCTION

The meeting was not quorate at this point, but it was agreed to continue as a record of information and discussion.

Members were welcomed to the meeting. Suzanne Smith will be invited to attend future meetings as officer with oversight of resources and school places.

Lisa Nicholson will be leaving at the end of the summer term.

Action – Clerk to notify the clerk to the Headteacher Forum for consideration at their next meeting

2. DECLARATIONS OF INTEREST

No declarations of interest received.

3. PUBLIC QUESTION TIME

No questions received

4. MINUTES

4.1 RESOLVED:

That the minutes of the meeting held on [20 January 2022](#) be confirmed.

5. MATTERS ARISING

5.1 Confirmed that BG had written to convey thanks to FW for her service to the forum (Item 1)

5.2 Confirmed that, through the Early Years Alliance, an independent body had published a view that £6.90 is the 'true cost' of provision of funded Early Years (EY) places. This is not the hourly rate paid by the government. It was acknowledged that the IOW pays a high base rate in comparison to other LAs (Item 7.6)

5.3 Quarter 3 data and information on distribution of Trade Union Facilities time is included at item 9 in [Paper B](#) (Item 7.9)

5.4 Confirmed that information and provision has been made so that special schools would not be at a disadvantage through de-delegation of the School Improvement Monitoring Service. (Item 7.11)

5.5 Confirmed that information on the SEN Strategy was given at the most recent Headteacher Forum meeting (Item 7.23)

5.6 Confirmed that EY provision for 2 year-olds is worded as 'funded' rather than 'free' in budget papers, as there is a cost to providers (Item 7.25)

JS and JB joined the meeting – now Quorate

6. 2021/22 BUDGET MONITORING [Paper B](#)

6.1 IR reported on the 2021/22 budget forecast at 31 January 2022. An overspend of £1,836,000 is predicted, which is approximately 2% of the £92,171,000 budget. A breakdown by block was given and further information shown in Appendix A.

EARLY YEARS

6.2 An underspend of £14,000 is expected, following the move to termly funding due to the pandemic. Final 2021/22 allocations will be confirmed at the next SF meeting on 14 July 2022. A further small underspend in entitlement funding may be confirmed at year end.

SCHOOLS BLOCK

6.3 Budget shares are passed on directly to schools and no variances were reported. An underspend of £282,000 is expected in the Growth Fund, following confirmation of no schools being eligible for this funding in 2021/22.

6.4 De-delegated funding for Trade Union activities is forecast to be fully spent, with any surplus re-distributed between unions. The budget for 2022/23 will remain at £44,000.

HIGH NEEDS BLOCK

6.5 As discussed in previous meetings, a significant overspend of £2,124,000 is expected, which is 12.4% of the budget. A budget gap of £1,494,000 was identified at the time of setting the 2021/22 budget in January 2021.

6.6 An unexpected increase of 14 placements in Independent Non-Maintained School provision (INMSS) resulted in a projected overspend of £473,000. Further pressure will arise from the agreement to split the cost of funding places equally between parties from 2021/22.

CS joined the meeting

- 6.7 Lower than expected occupancy and a shift towards lower complex banding contributed to a projected underspend of £117,000 in special school top-up funding. The table in para 13 shows activity levels by band.
- 6.8 Increasing demand for discretionary top-up funding in mainstream schools and the pupil referral unit (PRU) is expected to lead to an overspend of £310,000.
- 6.9 The number of Education Health and Care Plans (EHCPs) continues to grow and is 13% higher than in the previous year. This area has a predicted overspend of £147,000. The average top-up amount per child has increased and 47 EHCPs have been allocated under the new banding system, at an average cost of £3,400 per child.
- 6.10 Post-16 Top-up funding is expected to be overspent by £44,000 due to increased demand at IW College and HTP Apprenticeship College.
- 6.11 Top-up funding for resource provision is likely to be underspent by £132,000 as only one of the two planned primary units opened and secondary demand was less than expected.
- 6.12 Higher activity in the PRU (equivalent to 81 full-time placements) during summer 2021 resulted in an expected overspend of £98,000.
- 6.13 Spending on personal budgets has increased since 2019/20 and was expected to continue on this path – but levelled out close to the end of 2020/21. An underspend of £151,000 is expected.
- 6.14 SEN central teams expenditure was reduced due to remote delivery of services during the pandemic and is showing a £47,000 underspend.
- 6.15 An overspend of £39,000 is anticipated in EY SEN support, as the number of young children identified with SEN continues to increase.

CENTRAL SERVICES BLOCK

- 6.16 Non-SEN placements have reduced to two with an expected underspend of £11,000.

OTHER GRANTS

- 6.17 Further grants allocated by DfE for specific purposes are passed directly to schools.

CUMULATIVE DEFICIT AND CARRY FORWARD

- 6.18 The overall deficit, combined with the brought forward deficit from 2020/21 (£4,299,000) is expected to reach £6,135,000 – 5.89% of the budget allocation. Further information included in [Paper C](#)

QUESTIONS AND COMMENTS

Staff training and the Early Help Hub assist the identification of younger children with SEN and more complex needs. Early intervention is key.

In 2014 a review of the SEN Code of Practice brought changes to legislation and expectations. As a result, the number of EHCPs approximately doubled between 2014 and 2022. A review of the approach to supporting children with EHCPs is needed, to provide them with better opportunities in adult life.

Noted that the survival rate of babies with more complex needs has increased through improvements in medical science.

Action – Further data on numbers of children with Personal Budgets and in Non-Maintained School provision to be included in budget monitoring papers.

RESOLVED:

THAT the budget monitoring position as at January 2022 be noted.

7. 2022/23 SCHOOL FUNDING [Paper C](#)

7.1 BD gave a general overview of school funding and related matters for 2022/23.

SCHOOL FUNDING FORMULA 2022/23

7.2 The agreed funding formula was submitted to DfE in January 2022, was passed through with no amendments and enacted. Schools received notification of their budget shares on 1 February 2022. School budget software has been updated, to assist Business Managers with producing budget plans for May 2022.

EARLY YEARS FORMULA 2022/23

7.3 EY funding rates were agreed in January 2022 and indicative budget shares were sent to EY providers last week. There was no change to the formula agreed in January, but final adjustments to allocations will be made in July 2022, following DfE confirmation of January 2022 Census data.

HIGH NEEDS BLOCK SUPPLEMENTARY FUNDING

7.4 Additional High Needs funding of £744,740 was allocated to help with reducing the High Needs deficit and was built into the budget. This funding is also intended to contribute to the increase in National Insurance costs in special schools and PRUs. Mainstream schools will receive a specific grant, which is not applicable to special schools. Therefore, it is recommended that a small increase is made to top-up funding rates for special schools and PRUs from April 2022.

SAFETY VALVE PROGRAMME 2022/23

7.5 This intervention programme was introduced in 2020/21 and provides for LAs with the largest DSG deficits to have detailed conversations with the DfE. On 17 February 2022 the IOW was invited to take part in the programme, from September 2022. Officers will make the necessary preparations over coming months. If an LA is able to demonstrate that a sustainable financial position can be achieved, there could be a potential for the deficit to be cleared. Further information will be brought to the next Schools Forum meeting on 14 July 2022.

QUESTIONS AND COMMENTS

Confirmed that the additional High Needs funding received was proportionate to the size of the budget (6%) rather than the number of EHCPs.

Resource provisions are not separately included in the supplementary grant for mainstream schools.

[Noted concern raised by schools over effects of rising costs of heating, lighting, pay etc.](#)

IOW data shows the cost of utilities to be in the region of 1.5% of school budgets. The DfE supplementary grant is intended to assist with additional costs.

[Noted that decreasing pupil numbers makes schools more vulnerable and less sustainable. A forward-planning strategy is needed.](#)

Confirmed that officers will continue to raise these issues through professional organisations.

[Noted appreciation for increase to special school and PRU top-up funding. Special school with hydro-therapy pool greatly affected by rising costs of meeting the needs of children.](#)

Action – BG to write to DfE on behalf of Schools Forum to register HT concerns (GK offered support)

BP left the meeting

Some schools have solar panels, which are proving helpful – may be worth exploring?

BP re-joined the meeting.

BD agreed to include a link to DfE recommendations for schools on buying through a national framework for best value -

[Buying for schools - Guidance - GOV.UK \(www.gov.uk\)](http://www.gov.uk)

RESOLVED:

THAT the general updates in relation to 2022/23 schools and early years related funding be noted.

THAT the 2022/23 top up funding rates for special schools and pupil referral units be endorsed – unanimous.

SF and SH left the meeting

8. EDUCATION WHITE PAPER AND GREEN PAPER

BP reported on anticipated content of the white and green papers.

- 8.1 No great change is expected in the white paper, in that the DfE will re-state its aspiration for all schools to have a plan to join multi-academy trusts (MATs) by 2030.
- Maintained schools and single-academy trusts who fail Ofsted inspections will be directed to join a MAT.
 - Those with 2 or more 'Requires Improvement' (RI) Ofsted judgements may be brokered to join a MAT.
 - LAs may consider setting up MATs as they already have good relationships with headteachers. A consideration for the IOW's unique position might be a 'safe-haven' MAT as an option rather than an LA MAT.
- 8.2 The green paper will focus on strengthening SEN support and provision in schools and is likely to consult on -
- Assessing thresholds and making them more explicit
 - Improved provision in teaching, to meet the needs of EHCPs

Parent-voice is important - 96% of tribunals currently fall in favour of the parents. It is hoped that the system will become less adversarial and more balanced between the views of the parents and the school.

The vast majority of High Needs Blocks are in deficit due to increasing pressures in high needs. Changes in 2014 increased the age-range for post-16 EHCPs to 25. It is hoped that there will be more support for young people to progress into internships and work placements.

The key issue for the IOW is that funding received at national level, but the actual number of EHCPs is higher.

Officers will work on a robust plan for the Safety Valve Programme and will consult with Schools Forum in due course.

BP left the meeting.

9. SCHOOL FUNDING POLICY PACK AND SCHEME FOR FINANCING SCHOOLS 2022/23 – Paper D

- 9.1 A light-touch review was carried out and the policy pack refreshed to include updated links and age-weighted pupil unit (AWPU) values. The current Scheme for Financing Schools requires no change.

- 9.2 The Growth Fund criteria will remain the same for stability. It was agreed to use this as a balancing item in November 2021 and no budget is allocated for 2022/23. It was noted that some surplus school places may be offered through admission appeal panel decisions.
- 9.3 Further consultation on the National Funding Formula (NFF) may bring changes to the Growth Fund formula/criteria, but not expected for 2022/23.

SCHEME FOR FINANCING SCHOOLS

- 9.4 The scheme was updated in March 2021 and there are no mandated changes at this time. The scheme may be changed at any time, so the current scheme will continue until any further amendment is required.

QUESTIONS AND COMMENTS

Confirmed that there is no allocation for falling rolls in good and outstanding schools, and there is currently no contingency fund. There is not enough economy of scale - no schools are likely to meet the falling rolls' criteria.

RESOLVED:

THAT continuation of the existing criteria for growth and falling rolls for 2022/23 detailed in Appendix A be approved.

THAT the minor housekeeping updates to the policy pack in Appendix A which will apply from 1 April 2022 be noted.

THAT continued use of the Isle of Wight Scheme for Financing Schools applicable originally from 1 April 2021 be noted.

10. AOB

Action – BD to continue providing feedback/information to Headteacher Forum meetings.

DATE OF NEXT MEETING – All meetings will be virtual through Teams.

Thursday, 14 July 2022, from 8.30am

DATES OF FUTURE MEETINGS All at 8.30am

10 November 2022

19 January 2023

23 March 2023