



Minutes

Name of meeting	SCHOOLS' FORUM
Date and time	Thursday, 11 November 2021
Venue	Webinar – Virtual Meeting
Present	Beverley Gilbert – Brading CE Primary (Chair) Mike Hayward – Isle of Wight Education Federation Kevin McDermott – Christ the King College Duncan Mills – Cornerstone Federation Steve Fairclough – Brighstone CE Primary Lisa Nicholson – Haylands Primary Caroline Sice – Lanesend Primary Academy Sarah Hussey – Northwood Primary Academy Samantha Rooney – Isle of Wight College (substitute) 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	Sue Bowen – Church of England Diocese Jayne Hill – Niton Pre-school and Brighstone Pre-school

1. WELCOME AND INTRODUCTION

Members were welcomed to the meeting. It was noted that Schools Forum Regulations were amended to allow virtual meetings to continue (see Item ?)

2. DECLARATIONS OF INTEREST

No declarations of interest received.

3. PUBLIC QUESTION TIME

No questions received

4. ELECTION OF CHAIR AND VICE-CHAIR

In the absence of the clerk BP took the election. Members noted sincere thanks for the work undertaken in the chairing role.

4.1 BG was nominated and unanimously elected as Chair for one year.

4.2 BG requested nominations for Vice-Chair and CS agreed to continue. CS unanimously elected as Vice-Chair for one year.

5. MEMBERSHIP AND TERMS OF REFERENCE

5.1 In accordance with regulations, nominations were being sought for representatives where terms of office had ended or were coming to an end. Serving members in each case had agreed to continue for another term. (See item 11)

6. MINUTES

6.1 RESOLVED:

That the minutes of the meeting held on [15 July 2021](#) be confirmed.

6.2 MATTERS ARISING

There were no matters arising and no additional items for the agenda

7. TRADE UNIONS FACILITIES TIME [Paper D](#)

7.1 BD explained the background of the report on trade union duties and activities. Not all representatives had submitted reports, but all had received their contribution; with the exception of 'Voice'. Members asked what action is taken to follow up on 'nil returns'. (See action point - para 9.24 Recommendation 4)

8. 2021/22 BUDGET MONITORING [Paper E](#)

8.1 IR reported an in-year forecast overspend of £1,815,000 which would add to the brought-forward deficit of £4,299,000 bringing the overall total expected deficit to £6,140,000. This is 5.87% of the total budget allocation.

8.2 EARLY YEARS BLOCK

A slight underspend is anticipated due to reduced travel and supply costs.

8.3 SCHOOLS BLOCK

The growth fund is expected to be underspent in the region of £157,000 - due to the expectation that no schools will be eligible for this funding.

8.4 HIGH NEEDS BLOCK

An overspend of £1,978,000 (11.5% of the budget allocation) is anticipated, as funding is insufficient to meet demand and complexity of cases.

8.5 In addition to the £1,494,000 budget gap, further variances were noted.

- A net increase of 10 places at St Catherine's School contributed to pressure and an expected overspend of £507,000 for independent and non-maintained schools.
- Special school top-up funding has a forecast underspend of £154,000 – due to lower occupancy than anticipated at St George's School alongside emerging lower banding shift.
- The number of Education, Health and Care Plans (EHCPs) continues to grow and top-up funding in mainstream schools is forecast to be overspent by £88,000. The number of children supported is 11% higher than the previous year, with an increase in the average cost of provision. The new banding system was introduced in September 2021, with 18 plans at a higher average per pupil cost of £3,585.
- Top-up resourced provision is expected to be underspent by £98,000 as a result of lower activity in secondary in the new secondary unit and only one primary unit, rather than two, being opened in September 2021.
- An overspend of £100,000 is expected in top-up funding for the PRU (Pupil Referral Unit), due to an increase in activity, which is likely to continue.

- Early Years SEN has experienced an increase in demand and more complex needs, in comparison to summer 2020.
- Post-16 top-up funding has also seen an increase in demand at the IW College, HTP and VI Form provision in schools.
- A projected underspend of £132,000 was reported for personal budgets.
- Discretionary top-up funding for mainstream schools has an expected overspend of £98,000 as demand for additional support for children in mainstream schools continues so increase.

8.6 CENTRAL SCHOOL SERVICES BLOCK

No variances reported at this time.

8.7 OTHER GRANTS

Other DfE grants, including Pupil Premium and recovery funding are passported directly to schools.

DH joined the meeting

8.8 QUESTIONS AND COMMENTS

It was felt that the banding system is complex, particularly in special schools.

Q - A concern was raised around the effect the new banding system may have on budget pressures.

The banding system was implemented following full consultation with leaders and parents and included in the budget. Checks are carried out before issuing EHCPs and so far there have been no appeals. The system will help to put the IOW in a good position for the forthcoming national SEND review.

Q - Further noted that one school is planning to appeal, as the cost of provision is reportedly approximately £8,000 higher than the funding.

LAs have a legal obligation to fulfil requirements of EHCPs, which has led to the ongoing overspend in the high needs budget and is a national issue.

Q - Another concern is that EHCPs are being allocated to children who could be supported in school, following parental appeal.

The 2014 SEN and Disabilities Act put parental voice at the centre of decision making, so that tribunals must take this into consideration. Further info on the McArdle review - see item 10.

RESOLVED:

THAT the September 2021/22 forecast position be noted.

9. 2022/23 SCHOOL FUNDING [Paper F](#)

BD reported that 2022/23 will be the 5th year of the National Funding Formula (NFF) and the final year of the 2019 Spending Review. Funding is expected to have increased by £7.1 Billion in comparison to 2019. The formula will continue to be set with local values after consultation with schools and the formula factors remain mostly the same.

9.1 Minor differences are that

- NFF factors have increased by around 3%.
- Sparsity funding has increased overall and will be by road distance, rather than 'as the crow flies'.
- Free School Meals data (FSM6) is taken from October 2020 rather than January 2020 to reduce the lag in payments.
- Low prior attainment data is taken from 2019, as tests were cancelled in 2020.

- Business Rates will be paid directly by the Education and Skills Funding agency (ESFA).

LAs will continue to be able to transfer 0.5% from the School Block to the High Needs Block with Forum approval. The Minimum Funding Guarantee (MFG) will still be set between +0.5% and +2.0%.

9.2 HARD NATIONAL FUNDING FORMULA

BD informed members that the IOW is well placed for the DfE intention to implement the Hard Funding Formula (HFF). 105 LAs have moved closer to using national values, whilst 73 LAs (including the IOW) are almost exactly in line.

9.3 INDICATIVE DSG ALLOCATIONS

Indicative allocations were released to LAs in July 2021 to allow for modelling 2022/23 budgets. Final allocations will be received in December, based on October Census data.

9.4 DEDICATED SCHOOLS GRANT ACCOUNT

Whilst a number of LAs are required to have conversations with DfE, the IOW deficit of £4,299,000 has not yet reached the DfE threshold for discussion.

SH left the meeting.

- 9.5 BD highlighted the current DfE requirement for DSG deficits to be met from the DSG in the longer term.

CS left the meeting.

9.6 LOCAL FUNDING FORMULA PROPOSALS

It is proposed to continue using NFF values exactly for 2022/23 (with local area cost adjustment). This will lead to an increase of approximately 3% in values against 2021/22 and meet DfE requirements for minimum per pupil level (MPPL) protections.

- 9.7 Financial modelling shows an **indicative average** cash increase of 2.9% per school. Differences between schools are shown in appendix A and include - schools at or below minimum pupil levels, schools eligible for MFG, additional protection through the sparsity factor and business rates re-evaluations (i.e. new builds/extensions).

9.8 MINIMUM FUNDING GUARANTEE (MFG)

This funding is protection against per-pupil reductions, not falling rolls, with 9 schools being eligible. Changes in the Income Deprivation Affecting Children Index (IDACI) data incurred some turbulence in this funding area in 2021/22.

- 9.9 Scenarios of indicative options in relation to the MFG level were given and is proposed to continue at +0.5%.

9.10 GROWTH FUND/FALLING ROLLS

The final allocation will be known in December 2021 and will be based on changes in pupil numbers from October 2020 – October 2021. Not all data was available for the estimations carried out for the consultation with schools due to issues with ransomware. However, a later exercise identified **potential** funding in the region of £394,000, which would be a small reduction on last year.

- 9.11 No schools are currently, or expected to be, eligible for this funding and it is proposed to use unspent growth funding, after accounting for MPPL and MFG (estimated at £317,000) as a balancing item against the overall local school funding formula setting.

- 9.12 Growth funding was included in the recent DfE consultation on NFF, but there is no proposal to change local policy over the coming months.

9.13 RECONCILIATION OF INDICATIVE DSG SCHOOLS BLOCK

BD gave a brief overview of the proposals made to reconcile the Schools Block

9.14 DE-DELEGATED SERVICES

Forum members were asked for their view on de-delegation of school funding for the following services.

- Licences and Subscriptions – budget planning, finance reporting and Fischer Family Trust (FFT) (primary data)
- Trade Union Facilities Time – driven by membership numbers. Per-pupil rate was frozen last year. An increase for inflation was suggested for 2022/23 (i.e. 3% = 11p)
- Checking FSM Eligibility – no change to cost, although increase in activity expected, as more families apply as a result of COVID 19.

Per-pupil rates will be confirmed when December allocations are received.

9.15 SCHOOL IMPROVEMENT SUPPORT

DfE are consulting on possible move of the School Improvement Monitoring Grant from LAs into school budgets, so that schools may de-delegate funding for this service.

9.16 EDUCATION FUNCTIONS FOR MAINTAINED SCHOOLS

It is proposed to increase the per-pupil rate by £1 to £58, in order to maintain the levels of service in providing statutory duties in relation to pensions, audit and finance, premature retirement and redundancy.

9.17 CENTRAL SCHOOL SERVICES BLOCK (CSSB)

BD gave an overview of the current spend on services carried out on behalf of maintained schools and academies, with proposals for 2022/23. A small reduction in LA statutory functions is proposed as a balancing item for this budget area.

9.18 HIGH NEEDS BLOCK

An **indicative** increase of £1,342,000 (subject to the October census) is welcomed, but will not meet the budget gap, which is still likely to be in the region of £1,600,000.

9.19 BD showed how the allocation of EHCPs is continuing on a rising trend, causing ongoing pressure on the high needs budget. BD attended meetings with headteachers and school business managers, followed by consultation with schools on continuing with the following proposals, as in previous years –

- use NFF values
- set the MFG at +0.5%
- transfer 0.5% from the schools block to the high needs block.

70% of schools (31) responded and were unanimously in favour of the proposals. The number of responses was slightly down on last year, possibly due to there being no change to the principles. Comments and observations made were noted in [Paper F](#) Appendix C.

9.20 A full response to questions regarding deficits and premises factors will include Schools Forum views and be sent to headteachers soon after this meeting.

9.21 SPENDING REVIEW 2021 AND NEW SETTLEMENT

It is thought that schools budgets could increase nationally by £4.7 billion by 2024/25, with a possible increase of £1.6 billion for 2022/23. There is no definite information on additional funding or how it may be distributed at this stage.

9.22 The final allocation will be received in December 2021, noted to Schools Forum in January 2022 and subject to political ratification. Individual budget allocations will be released to schools in February 2022.

DM left the meeting

9.23 QUESTIONS AND COMMENTS

Q – *Members asked when the IOW might be required to enter discussions with DfE re the budget deficit.*

BP confirmed that the IOW is not an outlying LA, in need of urgent attention and will follow similar strategies to Hampshire, already noted to DfE.

Q – *Further info on suggested increase in contributions for Trade Unions?*

Confirmed increase is to pre-empt any changes for next year.

Q - *Concern over proposal to remove School Improvement Monitoring Grant?*

The grant covers Leading Learning Partner (LLP) visits, support from English and Maths improvement teams, subject networking opportunities. If the grant is transferred into school budgets, maintained schools would be able to de-delegate funding for this support in the same way as academies do now to their MAT. Representation are being made to both the DfE consultation and will be discussed with the Regional Schools Commissioner (RSC).

Action – BD to make headteachers aware – include in response to consultation on Funding Formula.

9.24 Confirmed that the LA will absorb the slight decrease in funding, using LA Statutory Duties as the balancing item in the CSSB.

RESOLVED:

1. THAT the proposal to determine the 2022/23 Isle of Wight School funding formula using the national funding formula values listed in Appendix A be supported – School and Academy Members – Unanimous (7)
2. THAT continuing minimum funding guarantee (MFG) at the lowest level of protection (+0.5% in 2022/23), working historic arrangements out of the system as quickly as possible be agreed - School and Academy Members – Unanimous (7)
3. THAT the principle that the balancing of the formula (after accounting for any differences in protection costs and final DSG schools block allocations) is achieved by any remaining funding being held within the growth fund budget (currently estimated at £317,000) be agreed - Unanimous (7)
4. THAT maintained schools, voting separately, agree to continue to de-delegate funding for the services in the table in paragraph 40. Primary (4) Secondary (2)

Action – JM to remind TU Reps that contributions are conditional on completion and submission of quarterly returns confirming TU activity.

5. THAT a continued contribution from maintained schools of £58 per pupil, to meet the cost of statutory services provided by the council for maintained schools be agreed – maintained schools. (5 for, 0 against)
6. THAT the proposed central school services block budgets for 2022/23 detailed in paragraph 52 be approved. (6 for, 0 against)
7. THAT the update on high needs funding, including the draft budget plan for 2022/23 be noted.
8. THAT a transfer from the schools block of 0.5% (currently estimated at £408,000) to the high needs block for 2022/23 financial year be approved. (6 for, 0 against)

KMcD left the meeting

10. MCARDLE REVIEW

BP informed members that the review is now expected in the spring term 2022. However, there is insight that the SEND Review Team are committed and recognise that the current system is not working well and is in urgent need of review.

10.1 SEN children were affected most by the COVID pandemic. A shared understanding is needed to incentivise early intervention, to 'get it right' and improve outcomes.

- Consideration should be given to funding and accountability (Ofsted) requirements.
- Thresholds for support may be introduced.
- Expectations set for maintained schools should be supported by funding.
- The IOW is in a good position in relation to guidance.

10.2 Gaps in training and development of staff supporting SEND should be addressed to enable the right intervention.

- A better dialogue to resolve disputes ahead of tribunals.
- Recognition that some children may need an EHCP throughout their life.
- Social Emotional and Mental Health – some needs may not always require a long term EHCP.
- Guidance on how to de-escalate/use special resourced provision

10.3 EHCPs may be in a standardised format and portable.

10.4 It was agreed that there is a need to engender greater confidence of parents in the system, particularly in secondary provision.

11. MEMBERSHIP AND TERMS OF REFERENCE

The IOW Schools Forum Terms of Reference were reviewed and amended to include the allowance for virtual meetings to continue. Where a schools forum agrees to continue with virtual meeting, arrangements must be made to allow any member or interested party who does not have phone or internet access to be able to join the meeting.

Action – Agreed

11.1 BG had agreed to continue for another term as Primary HT Representative and no further nominations had been received.

Nominations have been requested for the following representatives - Academy, Secondary Governor, Early Years, 16 – 19 Education. In the absence of further nominations, serving representatives are willing to continue.

A nomination has been received for SR to replace FW as 16 – 19 Education Representative.

Nomination and any election outcomes will be further noted to members when procedures are completed.

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

Thursday, 20 January 2022, from 8.30am

DATES OF FUTURE MEETINGS All at 8.30am

24 March 2022

14 July 2022

10 November 2022

19 January 2023

23 March 2023