

Minutes

Name of meeting	SCHOOLS' FORUM
Date and time	Thursday, 14 July 2022
Venue	Webinar – Virtual Meeting
Present	Beverley Gilbert – Brading CE Primary (Chair) Steve Fairclough – Brighstone CE Primary Vicky Reader – Oakfield CE Primary (HT Rep from 1 st Sept 22) Kevin McDermott – Christ the King College Mike Hayward – Isle of Wight Education Federation Caroline Sice – Lanesend Primary Academy 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 Nicola Blake – Executive HT, Hampshire and IOW Virtual School Cllr Debbie Andre – Lead Councillor for Children’s Services and Education Diane Hiscock – Clerk
Apologies	Suzanne Smith – Assistant Director, Access, Resources and Business Development Lisa Nicholson – Haylands Primary Samantha Rooney – Isle of Wight College Sue Bowen – CE Diocese Kevin McDermott – Christ the King College

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. Vikki Reader, from Oakfield CEP will replace Lisa Nicholson from 1 Sept 2022, as Primary HT Representative.

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 [24 March 2022](#) be confirmed.

5. MATTERS ARISING

- 5.1 Data on personal budgets included in Paper E, at Item 11 (Item 6.18)
- 5.2 A letter was sent to the Secretary of State for Education on behalf of Schools Forum, registering concerns on education funding on 25 May 22. (Item 7.5)
- 5.3 BD continues to provide information to schools and attend HT Forum meetings. (Item 10)

CS and JB joined the meeting – now Quorate

6. PUPIL PREMIUM PLUS AND LOOKED AFTER CHILDREN – ANNUAL UPDATE 2021-22 [Paper B](#)

- 6.1 NB explained the how the LA is responsible for effective use of Pupil Premium Plus funding. Distribution is agreed through Personal Education Plans (PEPs) to meet the needs of Looked After Children (LAC).
- 6.2 The report showed a snapshot of numbers of children in care, which is continually changing, as children move into care, or move on – including adoption or return to parents.
- 6.3 The Virtual School provision is delivered as if it were one school, although children are placed in a range of schools. The team works in close partnership with schools to improve the educational outcomes of children in care. Despite some challenges with securing placements, there is good stability on the IOW.
- 6.4 Some of the children are asylum seekers, who need to be supported in an environment where there is a good cultural match; for this reason 33 children are currently placed with other authorities.
- 6.5 A full-time Deputy HT has been seconded from Hampshire Inspection and Advisory Service (HIAS) for a year, to provide strategic support in relation to vulnerable children, who have a social worker. The role is focused on improving work with education settings and identifying barriers to effective networking.
- 6.6 Children who were previously looked after are not included in the Virtual School remit and not required to have a PEP. However, good practice support and advice are provided to assist the different arrangements for these children.
- 6.7 Pupil Premium Plus funding is distributed to schools in termly instalments, with a small amount retained centrally to provide services and interventions. Central funding cannot be carried forward to the following year and unused funding will be recovered.
- 6.8 The Virtual School Pupil Premium Policy is being further developed for the next academic year. Work will continue on monitoring attendance and attainment data, partnership work and there will be a focus on providing high quality training for Designated Teachers.
- 6.9 Virtual School provision is mostly delivered through partnership working and service level agreements (SLAs)
 - Work with Island Futures has supported Yr 11 students, offering clear pathways to post-16.
 - Attendance at Early Years (EY) PEP meetings to support meeting the needs of young children.
 - Work with SEN Team to support children with additional needs.
 - Bespoke consultations and training for staff through Hampshire and IOW Education Psychologist service.

- Hampshire pilot scheme for supporting young asylum seekers through the Ethnic Minority and Traveller Achievement Service – now offered to IOW.
- Resources for children in care made available – a continuing benefit from remote working.
- Full-time post with the Resilience Around the Family Team (RAFT) to support children with relationships and engaging in education.
- Work with Social Workers has provided a positive impact.

6.10 Data shows outcomes and achievement are improving. The Virtual School Team will continue to monitor closely. Work is ongoing to develop an electronic PEP.

QUESTIONS AND COMMENTS

JH welcomed support for Early Years Children in Care and will report back to colleagues.

Hampshire Pilot offer will help asylum seeking children with transition to mainstream education.

Early support is central to improving outcomes.

RESOLVED:

THAT the Pupil Premium Plus for Looked After Children Annual Update – 2021-22 be noted.

7. 2021/22 SCHOOLS BUDGET OUTTURN & DEDICATED SCHOOLS GRANT (DSG) RECOVERY REQUIREMENTS [Paper C](#)

- 7.1 IR reported on the outturn position for schools budget at 31 March 2022 – an overspend of £2,046,000 (2.2%).
- 7.2 A breakdown by blocks showed the High Needs block to be the highest area of pressure, with an overspend of £2,522,000.

EARLY YEARS BLOCK

- 7.3 Underspent by £101,000 as funding for EY Entitlement is now based on the termly census. This change resulted in additional funding of £196,000. The spring allocation and final outturn will be confirmed later in July.

SCHOOLS BLOCK

- 7.4 No variances were shown and the Growth Fund remained unspent, as anticipated. Trade Union provision was underspent due to vacancies for representatives for ASCL and NASUWT. The underspend of £1,985 for Voice was re-distributed between other unions with representatives.

HIGH NEEDS BLOCK

- 7.5 Continuing pressures have led to an overspend of £2,522,000 (14.7%) and contribute to the overall budget deficit. A budget gap of £1,494,000 was identified at the time of setting the budget for 2021/22.
- 7.6 Budget pressures in this area are –
- 10 additional places placements in Independent Non-Maintained Special Schools (INMSS).
 - Change to funding arrangements – equal split between parties.
 - 47% increase in demand on discretionary top-up funding. 75% paid direct to schools, academies and pupil referral unit (PRU) – remainder for travel,

alternative provision and access to education. Comparison with previous years shown in para 14.

- 13% increase in numbers of children requiring top-up funding in mainstream schools. Average annual top-up per child increased by 3%. 63 children supported at a higher cost due to banding.
- Increased demand on Post-16 top-up funding at IW College and HTP.
- Increase from 65 to 77.67 full-time equivalent (FTE) pupils attending PRU.
- Demand for Personal Budgets increased. Table at para 19 shows and increase from £794,000 in 2020/21 to £996,000 in 2021/22. Highest areas of spend were alternative provision, direct payments to parents/carers and purchased tutoring. 32 children supported at 31 March 22 at an average cost of £32,477 per child.
- Top-up funding for pupils in other authorities overspent by £40,000.
- Increased number of EY children requiring SEN support – table showing increase from 67 in 2020/21 to 88 in 2021/22.

CENTRAL SERVICES

- 7.7 An underspend of £4,000 shown, due to a reduction in non-SEN placements.

OTHER GRANTS

- 7.8 These DfE allocations are passported directly to schools

CUMULATIVE DEFICIT AND CARRY FORWARD

- 7.9 The cumulative deficit of £4.3m carried forward with the 2021/22 deficit of £2.046m has led to an overall deficit of £6.345m – 6.09% of the total DSG allocation.

QUESTIONS AND COMMENTS

Members discussed how the deficit may be temporarily subsidised, but cannot be repaid by the LA (due to regulatory changes in previous years). This forms part of the LA accounting system.

Members agreed that changes to the SEN Code of Conduct in 2014/5 imposed ongoing financial burdens, which need to be addressed at government level.

RESOLVED:

THAT the final 2021/22 outturn position be noted.

8. 2021/22 SCHOOL BALANCES (MAINTAINED SCHOOLS) [Paper D](#)
- 8.1 BD reported on maintained school balances at 31 March 2022. The overall balance across 41 schools was £2.139m – which was better than anticipated in May 21. The number of schools in deficit was reduced from 7 to 6.
- 8.2 Noted that 14 schools worked with in-year deficits, mostly due to Covid-related pressures and some planned use of reserves.

SCHOOLS FINANCIAL VALUE STANDARD

- 8.3 All schools submitted their Schools Financial Value Standards (SFVS) returns on time. This is a mandatory financial self-assessment questionnaire. A sample are reviewed by the Audit Team for 'reasonable assurance' and 92% were completely evidenced.

SCHOOL BUDGET PLANS May 2022

- 8.4 Most schools submitted 3-year budget plans on time – a small number were delayed due to setting GB meeting dates for approval.
- 8.5 Continued pressure in relation to teachers' pay, rising energy and catering costs and inflation are causing some uncertainty through 2022/23. The number of schools expected to be in deficit remains at 6, with one school coming out of deficit and another with a possible unlicensed deficit, which will require DfE Schools Resource Management Advisor (SRMA) review.
- 8.6 A higher number of schools are expecting to be in deficit in year 2 and officers are working with schools to resolve these. Further schools (56%) are forecasting a deficit in year 3, but this is not unusual with the level of uncertainty whilst awaiting further budget updates.

SCHOOL CHALLENGE AND SUPPORT

- 8.7 Individual knowledge of schools is important and a RAG rating system is used to identify areas of concern. A range of intervention activities can be initiated to support schools at risk. The Director of Children's Services' annual review was completed in June, with initial communication sent to 6 schools.
- 8.8 Officers continue monitoring schools through meetings with School Business Managers (SBMs), working with the School Reorganisation Panel, use of DfE financial benchmarking tools and 'View My Financial Insights' (VMFI). Attendance at cross-department meetings enables finance officers to gain intelligence and a wholistic view of schools.

DFE ACTION PLANNING

- 8.9 LAs with more than 10 (or 10%) of schools, with a deficit of 7% or more, are required to produce a High Level Action Plan. With 5 IOW schools meeting this criteria (12%), a submission will shortly be made to DfE. It is anticipated that work put into reducing deficits will mean that a return will not be required in 2023.
- 8.10 Appendix A showed individual school balances and a snapshot of academy data at August 2021 was shown at para 24.

RESOLVED:

THAT the school balances position for the Isle of Wight local authority maintained schools be noted.

9. 2022/23 BUDGET MONITORING [Paper E](#)

- 9.1 IR reported a forecast overspend of £1.501m at 31 May 2022. A breakdown at para 2 showed the highest pressure to be in the High Needs block.

EARLY YEARS BLOCK

- 9.2 No variances forecast, but may arise following submission of actual activity from providers and confirmation of funding from DfE. No pressure expected from estimated summer term activity.
- 9.3 DfE are currently consulting on proposed changes to the EY Funding Formula and IOW will participate in the consultation.

SCHOOLS BLOCK

- 9.4 Most of this funding is passported directly to schools. No Growth Fund was set for 2022/23. A small underspend resulted from income from secondary schools and academies for Fischer Family Trust (FFT) subscription.

HIGH NEEDS BLOCK

- 9.5 A forecast overspend of £1.503m (7.9%) was reported. Increased funding and transfer from the schools block were not able to address the overall funding shortfall in this area.
- 9.6 The budget gap of £1.123m previously identified and further variances/pressures continue to cause concern –
- An increase of 5 placements in INMSS (mostly St Catherine's) since November 2021.
 - More complex banding requirements in special schools and a new cohort arriving in September 2022.
 - Continuing increase in children requiring Education Health and Care Plans (EHCPs). Top-up values per child also increased to an average of £4,051 (17% higher than the previous system based on LSA hours). Potential for further increase in spending as more EHCPs move to the banding system.
 - New resourced provision due to open at St Francis RCP Academy in September 2022 (8 places).
 - Higher than expected Post-16 SEN activity at HTP – may increase further from September 2022.
 - Discretionary top-up funding Requests from schools, for children who could have been placed in more costly independent provision, may cause further pressure.
 - Increase in number of personal budgets for children educated other than at school (EOTAS). Average annual cost also increased to £34,242 per child. A breakdown of expenditure highest areas of spend showed alternative provision, direct payments to parents/carers and purchased tutoring as for the previous year.

CENTRAL SERVICES BLOCK

- 9.7 No variances reported, although non-SEN placements have yet to be confirmed.

OTHER GRANTS

- 9.8 Passported directly to schools. PE and Sport Premium will continue for the academic year 2022/23 and Pupil Premium allocation is confirmed at £5.7m.

2023/24 SCHOOL FUNDING

- 9.9 The IOW will continue to mirror the National Funding Formula (NFF), which is expected to be implemented by 2027/28. DfE consultation on the implementation of the NFF is due to start in 2023/24. Themes are
- High needs transfers and notional SEN funding
 - Growth fund and falling rolls
 - Formula for premises funding
 - Annual funding cycle
- 9.10 Operational Guidance and indicative funding allocations for 2023/24 are expected later in July or August 2022.

QUESTIONS AND COMMENTS

Members agreed that SEN funding does not cover the cost of delivering requirements of EHCPs and meeting the needs of children. Schools are required to provide the first £6,000 of the cost of SEN provision.

The high proportion of children with EHCPs adds further pressure to the school budget, particularly where some schools have considerably more SEN children than others.

Discussions continue with DfE regarding the national shortfall in high needs funding.

Special and mainstream schools are impacted by the process at tribunals, which predominantly fall in favour of parents.

RESOLVED:

THAT the May 2022 forecast 2022/23 position be noted.

10. DEDICATED SCHOOLS GRANT MANAGEMENT PLAN UPDATE

- 10.1 BP communicated early thinking in relation to a plan for managing the DSG. As previously discussed, the DfE 'Safety Valve' programme may allow for financial support towards the deficit, if LA officers are able to establish a plan leading to an in-year balanced budget.
- 10.2 The cumulative deficit of £6.3m (6.1%) triggered the requirement for officers to meet with DfE. The IOW has a smaller deficit than many LAs who are in a similar position.
- 10.3 The IOW has the 5th highest proportion of children (5.4%) with EHCPs and 10th highest (15%) requiring SEN support. Numbers have risen by 99% in comparison to a national rise of 97%. A continuing rise could lead to 1,700 EHCPs by 2027, despite overall pupil numbers decreasing over time. The volume of EHCPs is the main contributor to the DSG deficit.
- 10.4 The national average of 4% children with EHCPs would equate to 987, whereas SEN2 information for the IOW showed 1,332 EHCPs at January 2022.
- 10.5 Highest increases in EHCPs in the year to January 2022 have been in the 13 – 16 and 17 – 25 age ranges. A small increase is shown in under 5's and more in the 5 – 10 age range.
- 10.6 A decrease in the 0 – 25 population is forecast at approximately 2.5% between now and 2027. However, EHCPs are still set on a rising trend. BP showed options for predicting numbers; the preferred 'mid-point' forecast shown at 1,523 EHCPs.
- 10.7 The SEN Team worked to complete 100% of phase transfers in year 1 and 96% in year 6 by February 2022. Staff capacity issues led to a delay in completion of EHCPs, but additional recruitment has since enabled recovery from the 'blip' with 81% of EHCPs completed on time in May 2022. This is well above national average performance.
- 10.8 Every EHCP requires 2 days deployment of an Educational Psychologist to make an assessment, advise and report. The Hampshire and IOW Educational Psychology Team (HIEPs) have continued to provide a timely service.
- 10.9 A High Needs Performance and Oversight Board was introduced in January 2022, with 3 strands of work to meet the needs of children as early as possible, improve outcomes while controlling costs and continue to improve LA performance.
- 10.10 Reductions in costs have been negotiated with INMS schools. Improved outcomes include supporting young people to become more independent and able to move on into work/work related placements. Officer attendance at annual reviews to be increased to inform and improve performance.

WORKSTREAM UPDATES

- 10.11 Improving capacity of SEN support. Improvement should be sector-led, to meet the needs of demand with a small funding block for training. Requests for new EHCPs tend to be higher in year 6-7 as pupils transfer to secondary school. Plans for a steering group to guide improvement.
- 10.12 Capacity building through inclusion project will focus on how well the needs of children are met. SEN conferences open to all.
- 10.13 Provide an inclusive economy with better pathways for post-16 students to move into adulthood and employment –
- Supported Internships, delayed through Covid, piloted in 2021/22.
 - Supported Apprenticeships – linked to Apprenticeship Levy
 - Employability Hub supporting young people into the world of work. Many young people want to be employed, but may not be suitable for all.
 - SEN Independence Hub – resourced provision to enable a more independent life, students able to study with peers – planned for 2023–24. Similar to Alton College.
- 10.14 A sufficiency strategy is planned for implementation from January 2023. Capital funding used for provision of additional places at St Francis RCP Academy resource provision.
- 10.15 A bid is being made for a new all-through (9-16) special school, focusing on SEMH/ASC provision. Land has been identified. A case for this has been put to DfE through ongoing discussions and a formal bid. If accepted, will lead to savings in high needs block.
- 10.16 A review of the SEN Team and Transformation Team has been carried out and should inform options for building additional capacity.
- 10.17 Dynamic EHCP reporting will help to increase LA involvement in annual reviews. Challenge and support will be available to headteachers to assist SEMH students into developing independence and the ability to move on, where appropriate.
- 10.18 Special School Funding is under review – a standardised approach is proposed for September 2023. Virtual information sessions are taking place for special schools and resourced provisions, with more in-depth work to follow.

SAFETY VALVE PROGRAMME

- 10.19 IOW invited to work with programme to address DSG deficit, which is small in comparison to some LAs, from September 2022, covering period to 2026/27. Template has been completed and is being signed off. If management plan to achieve in-year balance is accepted, DfE may support the deficit. 13 LAs already have agreement with DfE.
- 10.20 Impact of strategies are expected to avoid cost in excess of £8,228,000 up to 2026/27.

NEXT STEPS

- 10.21 Completion of template – July 2022
2nd meeting with DfE – August 2022
Main meeting with DfE to consider safety valve programme – September 2022.

QUESTIONS AND COMMENTS

Recent training has shown that thinking outside the box is beneficial to supporting young people to gain independence.

Slides will be circulated with minutes.

Responsibility for annual reviews lies with schools – cannot plan for staffing issues that may arise. EHCPs should be updated.

School staff need further bespoke training to support children with EHCPs. Can be provided through subscription to Outreach Service.

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

Thursday, 17 November 2022, from 8.30am

DATES OF FUTURE MEETINGS All at 8.30am

19 January 2023

23 March 2023