



Minutes

Name of meeting	SCHOOLS' FORUM
Date and time	Thursday, 19 January 2023
Venue	Webinar – Virtual Meeting
Present	Beverley Gilbert – Brading CE Primary (Chair) Vicky Reader – Oakfield CE Primary Steve Fairclough – Brighstone CE Primary Carl Wake – St Helens Primary (prospective member) Simon Richards – Haylands Primary Rachel Richards – Cowes Enterprise College (Academy) Mike Hayward – Isle of Wight Education Federation Jackie Boxx – Island Learning Centre (Vice-Chair) Jayne Hill – Niton and Brighstone Pre-Schools
Officers	Brian Pope – Assistant Director, Education and Inclusion Barry Downer - Senior Finance Business Partner Irina Rowan – Finance Business Partner Steve Willingham – Learning Resource Officer Ashley Jeffries - Cllr Debbie Andre – Lead Councillor for Children’s Services and Education Diane Hiscock – Clerk
Apologies	Sue Bowen – CE Diocese Julie Stewart – Medina House School

1. WELCOME AND INTRODUCTION

All were welcomed and introductions made.

2. DECLARATIONS OF INTEREST

No declarations for this meeting.

3. PUBLIC QUESTION TIME

None received for this meeting

4. MINUTES

RESOLVED

That the minutes of the meeting held on [17 November 2022](#) be confirmed.

5. MATTERS ARISING

5.1 A register of interests has been drafted and will be posted in Teams. Members will shortly be prompted to access the document and make their declarations. (Item 4)

5.2 CW had agreed to attend this meeting as prospective Primary HT Representative.

Noted that the new HT at Christ the King College might be interested in taking up the Secondary HT Representative post. (Item 5)

Action – Clerk to follow up

6. TEAMS DEMONSTRATION

SW gave a brief demonstration showing how Schools Forum members would be added to a Team, which will enable all to join meetings easily. Teams is a useful platform for communication and documents can be stored, accessed and amended in one place; reducing the need for e-mails and attachments.

Action – SW to add members and documents to Teams

7. TRADE UNION FACILITIES TIME [Paper B](#)

TU representatives had submitted quarterly returns showing time used on Trade Union activities, as in previous years. NASUWT responses are still to be received as the representative is newly appointed and being supported into the role.

8. 2023/24 SCHOOL FUNDING FORMULA [Paper C](#)

8.1 This is the first of 2 reports and builds on discussions from the last meeting held on [17 November 2022](#).

8.2 SCHOOLS BLOCK

The final allocation is based on indicative information and news announcements around school funding. An overall decrease of 89 pupils resulted in a lower final allocation. The estimated Growth Fund allocation, estimated at £427,000 was actually £334,000 following the outcome of the autumn census.

8.3 Expected pupil rates were paid, but there was a shift in pupil characteristics, with increasing Free School Meals (FSM) and English as an Additional Language (EAL) requirements. The final DSG allocation is based on pupil characteristics in October 2021, but individual schools receive funding based on pupil numbers at October 2022. This causes a lagged pressure on schools block budgets and pupil numbers had decreased between October 2021 and October 2022.

8.4 FINAL LOCAL FUNDING FORMULA

Schools were engaged in discussions through the autumn term and the Local Funding Formula (LFF) was approved by Cabinet on 12 January 2023. As noted in previous meetings the 2022/23 supplementary grant is now rolled into the National Funding Formula (NFF) and included in school budget allocations.

8.5 NFF values have also increased by around 2.4% for basic entitlement, low prior attainment, EAL, mobility, sparsity and lump sum factors, and 4.3% for FSM and deprivation factors, leading to slightly better funding for deprived schools.

8.6 LAs are still able to transfer up to 0.5% from the Schools Block to the High Needs Block with agreement of Schools Forum. The Minimum Funding Guarantee (MFG) has been set at 0.5% as the minimum increase schools will receive, but there will be no cost, as historic arrangements have worked out of the system.

8.7 RECONCILIATION OF THE FINAL SCHOOLS BLOCK (December 2022)

Schools Forum members previously agreed to meet NFF requirements as closely as possible. Balancing the budget was extremely difficult, particularly due to the increase in FSM. It had been anticipated that there would be funding available for GF as the balancing item, but only £326 remained at the final outcome. The proposed High Needs Block transfer was unaffordable.

8.8 FUTURE YEARS

Members should bear in mind the caveat that budget-setting is likely to continue to be tough in future years. It may be necessary to cap or scale back the gains made by schools, to ensure the budget is balanced and affordable. Further discussion will be picked up through the summer term 2023.

8.9 QUESTIONS AND COMMENTS

It was noted that schools understand and appreciate the open approach and honest discussions through HT Forums.

Model scenarios will be shared and schools will be involved in decision-making through consultation.

Moving forward, EAL pupil numbers should be included in the School Census, but numbers of pupils with FSM eligibility can be unpredictable. The proportional increase in FSM for this year was approximately 23 – 24%, which has quite an impact financially.

Also noted that future guidance may change.

8.10 MAINSTREAM SCHOOLS ADDITIONAL GRANT (MSAG) 2023/24

The MSAG is additional funding and indicated to be in the region of £2.9m for the IOW. Estimated school allocations are shown in [Paper C](#) Appendix B.

8.11 A slight amendment was noted for the example shown at para 14, which should read as follows –

Example: Primary school with 184 pupils on roll (Oct 22) and 24 FSM6 pupils (£4,510 lump sum + 184 pupils x £119 + 24 pupils x £104) x 1.01421 ACA = £29,313 allocation

8.12 The table at para 15 showed average funding changes from 2023 – 2024.

Figure in brackets = funding for 2022/23

Grey = Initial estimated funding for 2023/24

Light Blue = Final funding for 2023/24

Dark Blue = Final funding + MSAG for 2023/24

8.13 NEXT STEPS

Funding formula will be sent to DfE on 20 January 2023. Schools should receive notification of individual allocations from 30 January 2023 – ahead of deadline.

8.14 QUESTIONS AND COMMENTS

Although additional funding through the MSAG noted in para 13 is welcomed, it was noted that additional money is often offset by additional costs.

The MSAG is to support schools in dealing with rising pressures, including energy. the forthcoming pay award (and expected strikes).

The £30,000 starting salary for teachers will also impact school budgets.

RESOLVED

That the Isle of Wight local school funding formula for 2023/24 be noted.

9.0 DEDICATED SCHOOLS GRANT (DSG) BUDGET 2023/24 [Paper D](#)

BD gave an overview of the report, following receipt of the final DSG allocation in December 2022.

9.1 2023/24 DEDICATED SCHOOLS GRANT FUNDING SETTLEMENT

The total DSG has increased from £107,942 in 2022/23 to £114,360 for 2023/24 - an overall increase of £6,418. This includes the Supplementary Support Grant of around £2.4m, which is now rolled into the DSG.

9.2 Other changes include additional funding for Early Years (EY), High Needs and the Funding Formula. Changes to pupil characteristics have also impacted the final allocation. Reminder – the MSAG is separate to the DSG.

9.3 EARLY YEARS

EY funding is expected to increase by £335,000 following the January Census, but will be confirmed in July 2023. Changes to the funding formula include updating underlying data, area cost adjustment, premises-related costs and teacher pay and pension protection.

9.4 Schools Forum agreed 95% of the funding be passported directly to providers, with 5% remaining for central services. The proposed central funding allocation will be £328,070 for the service provided by the Early Years Advisory Team (EYAT). This is an increase of £21,000 relating to the expected pay award, incremental increases and inflation. There is no change to the structure of the allocation.

9.5 Discussion with EY Providers on rates payable and the funding formula for 2023/24 will continue prior to the release of estimated budgets by 31 March. Current proposals are for an increase to -

- £5.55 for 2 year-olds; an increase of 6 pence, which includes 3 pence for increased demand in SEN
- £4.52 for 3/4 year-olds; an increase of 22 pence, which includes 1 pence for teachers' pay and pension protection and 3 pence for increased demand in SEN.

9.6 SCHOOLS BLOCK

School funding is managed through the funding formula, which continues to follow the NFF as closely as possible.

9.7 GROWTH FUND

An estimated GF, previously agreed as a balancing item, was found to be unaffordable due to changes in pupil characteristics. Growing numbers of pupils eligible for FSM is a main factor.

9.8 DE-DELEGATED SERVICES

The table in para 20 shows a breakdown of the de-delegated services that were agreed in November 2022

9.9 EDUCATION FUNCTIONS

Schools Forum had agreed in the meeting held on [17 November 2022](#) (Item 10.17) that the charge for functions in relation to maintained schools be increased from £65.50 to £72. The increase is due to the School Improvement and Monitoring Grant, which was previously separate, being included in school budgets.

9.10 HIGH NEEDS BLOCK

An increase of £908,000 has been confirmed. Together with additional funding of £903,000 confirmed through the Autumn Statement, the total increase will be £1.8m. However, there is still a funding shortfall of £2.08m due to ongoing pressures in this area.

9.11 Although a proposed transfer of up to 0.5% from the Schools Block was agreed and estimated at £4,280, it was not affordable, due to the budget gap and working to meet NFF requirements. This proved to be the most difficult year in balancing the budget and

resulted in a 0% transfer to the High Needs Block with a need to identify £2.089 savings, as shown in the table in para 25.

9.12 SAFETY VALVE PROGRAMME (see also paras 10 – 10.4)

The IOW is taking part in the DfE Safety Valve Programme, to support LAs with high deficit budgets. Work undertaken will feed heavily into how the budget is constructed for forthcoming years. A draft management plan was submitted for DfE consideration and further feedback will be available at the next meeting in March 2023.

9.13 SPECIAL SCHOOL AND PUPIL REFERRAL UNIT FUNDING

Additional High Needs Guidance requires increased funding to be passed on to special schools and pupil referral units as follows –

- 1.5% added to top-up rates for 2022/23
- 1.5% added to top-up rates for 2023/24
- 3.4% funding increase – paid as a lump sum

Information has been shared with the schools concerned and will be finalised along with budget allocations to mainstream schools.

9.14 CENTRAL BLOCK

The reduction in pupil numbers resulted in an allocation £3,000 less than estimated. Other than a minor change in copyright licenses, all services were as expected, with LA statutory functions being used as the balancing item to address the shortfall.

9.15 OVERALL SCHOOLS BUDGET

The final DSG and Budget allocations are shown in the table at para 32. £25.636m is deducted for academies, leaving an overall DSG budget of £88.724m for distribution to maintained schools. The budget was approved by IWC Cabinet in January 2023 and will be reported to DfE through the Section 251 return in April 2023.

9.16 QUESTIONS AND COMMENTS

[Reports are circulating that EY pre-schools and nurseries are becoming vulnerable nationally – what is the position on the IOW?](#)

- IWC has a statutory duty to ensure there are sufficient places to meet the needs of EY children. Pupil numbers are falling which will impact funding.
- Some funding is being moved from the base budget to Inclusion, for children with EHCPs.

[It was noted that a number of settings are struggling, particularly with staffing costs, the minimum wage increase and the consumable charge. The EY sector needs more funding. Sight of the sufficiency monitoring research/information would be helpful.](#)

Places/sufficiency information can be made available through the EYAT. It was acknowledged that over 90% of EY provision is rated as Good or better. Settings are performing a brilliant service.

[Noted – thanks to LA for absorbing the budget shortfall for central services.](#)

[How would any possible pressure on the Grant Fund be managed?](#)

There is potential for pressure in the Secondary Sector from September 2023, which would require further discussion. Officers will continue working with DfE on managing the wider DSG issues.

RESOLVED

That the Early Years Central Team budget of £328,070 for 2023/24 be approved – unanimous (8)

That the proposed increases for the early years funding rates be endorsed – unanimous (8)

That the proposed DSG budget allocations for 2023/24 set out in appendix A be noted.

10. SAFETY VALVE AND DSG PLAN MANAGEMENT UPDATE

Regular meetings with DfE are ongoing, to discuss the proposed plan for managing the DSG and achieving an in-year balanced budget by 2027. More information will be available in March 2023 following a DfE decision on the plan and should be shared with Schools Forum at the next meeting – 23 March 2023.

- 10.1 A bid for £12.7m revenue funding has been included, to invest in services and enhance early intervention. This provision would support children at an early stage so that they may not need an Education, Health and Care Plan (EHCP) in the longer term. The bid includes introduction of a new Primary Behaviour Service, development of a Special Educational Needs Co-Ordinator (SENCo) service and training for schools.
- 10.2 A further bid has been made for a new Special School, where places would be less costly than in an Independent Non-Maintained Special School and would lead to savings overall.
- 10.3 Research into effective resourced provision has led to consideration and discussion around a possible Employability Hub, sited at IW College. The aim is to raise aspirations of children post-16 and offer more supported internships or apprenticeships. Most young people want to get a job and become independent, although some will still need to continue with an EHCP until they are 25.
- 10.4 Officers would attend more annual reviews and enable provision to be reviewed regularly to suit the needs of the child and build resilience.

Action – Safety Valve and DSG Management Plan to be included on agenda for the next meeting, 23 March 2023

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

Thursday, 23 March 2023, from 8.30am

DATES OF FUTURE MEETINGS All at 8.30am

13 July 2023 11 January 2024
17 November 2023 21 March 2024