

Minutes

Name of meeting	SCHOOLS' FORUM
Date and time	Thursday, 23 March 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 Simon Richards – Haylands Primary Rachel Richards – Cowes Enterprise College (Academy) Jackie Boxx – Island Learning Centre (Vice-Chair) Julie Stewart – Medina House School 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 Cllr Debbie Andre – Lead Councillor for Children’s Services and Education Diane Hiscock – Clerk
Apologies	Sue Bowen – CE Diocese Mike Hayward – Isle of Wight Education Federation

1. WELCOME AND INTRODUCTION

AM was welcomed to the meeting and agreed to take on the role of Secondary HT Representative. Introductions were made.

2. DECLARATIONS OF INTEREST

No declarations for this meeting.

3. PUBLIC QUESTION TIME

A note of clarity had been received that Peter Shreeve, although an NEU Representative, has not been engaged through any IOW organisation and therefore, has received no payment from the Trade Union Facilities Time allocation. He continues to work on a voluntary basis.

It was confirmed that TU Facilities payment has been fully distributed between Trade Union organisations.

4. MINUTES

RESOLVED

That the minutes of the meeting held on [19 January 2023](#) be confirmed.

5. MATTERS ARISING

- 5.1 A register of interests has been posted in Teams in the General/Files/Policy Documents folder. (Item 5.1)

Action - Members should access the document and make their declarations or make a 'none' declaration by 31 March 2023

- 5.2 AM agreed to take on the role of Secondary HT Representative. (Item 5.2)

Action – Clerk to arrange for Teams, circulation list and membership info to be updated.

- 5.3 There is also a vacancy for an Academy Representative.

Action – Clerk to advertise vacancy to academy proprietors

- 5.4 Members were asked if they had any problems with accessing documents/meetings. There were some issues where Teams seemed to clash with use of other platforms in school (Item 6)

Action – Members should notify the clerk to seek support for any issues

6. 2022/23 SCHOOLS BUDGET MONITORING [Paper B](#)

- 6.1 IR reported the position at 31 January 2023, with a predicted overspend of £2,242,000. The table at para 2 shows a breakdown by block, with an overview of each service area at Appendix A.

6.2 EARLY YEARS

An underspend of £14,000 is expected. Initial indications from the January census showed a likely decrease in take up of funded places of 5.6% for 2 year olds and 3% for 3-4 year olds. This would result in a £128,000 reduction in funding, although an agreed contingency plan was agreed to reduce the overall effect. No further pressure is currently anticipated, but the position will be confirmed following confirmation of spring 2023 activity.

6.3 SCHOOLS BLOCK

School budget shares were received by schools before the beginning of the financial year. There was no provision for a Growth Fund, which was unaffordable - and there had been no requirement for this in 2021/22. However, possible future pressure in secondary school places may require further consideration.

- 6.4 There may be a slight underspend in the de-delegated budget for Trade Union facilities time, due to vacancies for representatives.

6.5 HIGH NEEDS BLOCK

An overspend of £2,492,000 is expected, after taking account of additional DfE funding and transfer from the schools block. A budget gap of £1.1m was identified in January 2022 and activity has further increased. Proposals for future savings are continuing through the Safety Valve Programme.

- 6.6 Mainstream top-up funding for Education Health and Care Plans (EHCPs) is expected to overspend by £331,000. EHCPs have increased by 14% and the top-up value has increased by 8%. 51% of children with EHCPs have been assessed through the banding system. Pressure is likely to increase as more EHCPs move across to banding.

- 6.7 Discretionary top-up funding, paid directly to schools for children who may otherwise need independent placements, is likely to have an overspend of £310,000. The table at para 13 shows a breakdown of how the funding is used.

- 6.8 An increase in direct payments and managed education packages, for children Educated Other Than At School (ETOAS) has led to an expected overspend of £514,000. Pressure is likely to continue. The table at para 14 shows a breakdown of costs in relation to support – 44% of the funding is used for direct payments.
- 6.9 Increased demand for alternative provision has led to 10 more places than expected being required at the Island Learning Centre, Pupil Referral Unit (PRU). This is likely to result in an anticipated overspend of £194,000.
- 6.10 Both special schools are at full capacity and an expected overspend of £163,000 is due to increasing numbers of children with more complex needs, being placed in higher bands.
- 6.11 An expected overspend of £51,000 for Post-16 top-up funding is due to more pupils with Special Educational Needs (SEN) attending the Island VI Form.
- 6.12 Demand for Early Years (EY) SEN support increased by 20% in 2021/22 and a further 10% so far this year – indicating an expected overspend of £60,000.
- 6.13 It is estimated that the Independent Non-Maintained Special School (INMSS) budget line will be underspent by £245,000 as off-island places have reduced.
- 6.14 Top-up funding for resourced provision is expecting an underspend of £30,000 due to initial lower occupancy on one site. These provisions will operate at full capacity from September 2023.
- 6.15 A £77,000 anticipated underspend in In SEN Central Teams following the move from Thompson House. A further £93,000 underspend is expected due to an SEN improvement project that was not implemented in this year.

6.16 CENTRAL SERVICES

An underspend of £53,000 is anticipated as there are currently only 2 Independent Non-SEN placements.

6.17 OTHER GRANTS

This funding is passported directly to schools and includes DfE grants such as Pupil Premium, Universal Infant Free School Meals and Sixth Form Funding.

6.18 CUMULATIVE DEFICIT AND CARRY FORWARD

The expected deficit of £2,242,000 with the deficit carried forward from previous years at £6,345,000 would result in an overall expected deficit of £8,769,000. The Safety Valve Programme agreed with DfE is expected to bring additional funding of £5.1m (see Item 7 – 7.20) to support recovery.

6.19 QUESTIONS AND COMMENTS

It was confirmed that with additional funding of £2.5m and a £2.1m overspend, the High Needs spend was £4.6m over the last year.

RESOLVED

That the budget monitoring position as at January 2023 be noted.

7. SAFETY VALVE AND DSG MANAGEMENT PLAN

BP noted that High Needs budgets are overspent by around £3Bn nationally, as nearly all LAs are in deficit. This is a result of changes implemented from 2014/15 and raising the age range for EHCPs to 25 yrs old. In recognition of the difficulties incurred, DfE produced the [Green Paper](#) to review SEND provision. Changes to policy and practice are needed, along with additional funding for Special Needs.

- 7.1 If a child has an EHCP the LA have a statutory duty to fund provision to meet the requirements of the EHCP.
- 7.2 The last inspection of SEND Services on the Island focussed on provision, LA leadership and the Health Authority. The outcome was that SEND is improving and leaders work well together, leading to better outcomes for children. The IOW was in the top 1/3 nationally, in relation to inspection outcomes.
- 7.3 The EHCP process has a 20-week time-limit, from application to assessment. The IOW manages to meet this requirement in 70 – 90% of cases, against a national average of 60%.
- 7.4 By 15 February, the LA must name a secondary school for all transferring pupils and this was achieved at 100%. The IOW is on track to meet the requirement to identify post-16 provision for respective pupils by 31 March.
- 7.5 Along with 20 other LAs, the IOW was invited to take part in the Safety Valve Programme. The aim to achieve an in-year balance budget by 2027, enabling the current deficit to be written off.
- 7.6 Thorough analysis of all data, visits to other LAs and discussions with consultants and the Chartered Institute of Public Finance (CIPFA), have contributed to drawing down a range of strategies to support IOW SEN provision in an appropriate and more cost effective way. DfE SEN consultants are confident in the proposals and BP noted thanks for the work and effort put in by all LA Officers involved.
- 7.7 Ultimately, the intention is to achieve the best for all children and prepare them for a fulfilling life. Ongoing discussions have helped to deepen relationships with groups such as Parent Voice and others representing children and young people. Building capacity to meet the needs of children at an earlier stage will help to avoid the need for later (statutory) intervention.
- 7.8 In anticipation of the new national guidance expected in 2025, guidance for IOW providers and a new SEN toolkit has been produced, for staff to use and be prepared in advance.
- More training will be offered along with a new qualification for Special Educational Needs Co-ordinators (SENCOs).
 - Parent Voice recommended setting up a forum for SEN Governors.
 - School Improvement visits will focus on SEN support.
 - Advice given in relation to support should be in addition to (and not include) what the school should ordinarily provide.
 - Appropriate support to meet the needs of the child may mean that an EHCP is not always needed.
 - Network for SENCOs to share and develop good practice and SENCO circles will enable discussion and sharing ideas.
 - Advice and support line for SENCOs.
 - Hampshire and IOW Educational Psychologist team is the largest nationally. Trainees are employed through the University College, London to ensure ongoing progression and development.
 - Mental Health Support teams help to develop skills for teachers and staff to support children.
 - The Outreach Service is managed through Medina House School.

- 7.9 LA Officers will attend more annual reviews of EHCPs, to ensure tighter outcomes, so that children can gain greater independence at Post-16. They would be supported to move on from the requirement for an EHCP where possible.
- 7.10 EHCPs have been transferred to a digital system and will all be managed in this way. A panel will consider the threshold and assess those that are most likely to need an EHCP. Where a decision is that an EHCP is not necessary, further explanation and discussion with parents will be provided through the Educational Psychologist team, hopefully to avoid escalation to tribunal.
- 7.11 The IOW has already introduced a banding system, ahead of the expected national requirement. At present there are no set rates payable for each band nationally and this may cause variations in funding for schools in some LAs.
- 7.12 BP noted gratitude to IW Councillors for agreeing funding to increase the number of SEN caseworkers to support the programme.
- 7.13 Weekly meetings with DfE, analysing data and provision, has led to government supporting the proposals made.
- 7.14 More resourced provision is needed to reduce the need for costly placements and EOTAS. Some children will still need Off-Island provision, funded by the LA, which is more suited to their particular needs. It is important not to limit the opportunity of qualifications to only what is offered on the IOW.
- 7.15 Addressing the deficit will help with development of the Primary Behaviour Support Service. The outstanding behaviour curriculum provides good value for money. There have been no primary exclusions so far this year.
- 7.16 A consultation was held on the proposal to re-focus the Island Learning Centre toward secondary provision. The final decision will be made soon.
- 7.17 Research with KS4 students has shown that they would aspire to get a job and have independence. Development of an Employability Hub will support them to move on from needing an EHCP, into supported internships and/or apprenticeships. Local companies have engaged well with the LA in building SEN internships into contract agreements.
- 7.18 A strong inter-connected system will lead to better outcomes and value for money.
- 7.19 QUESTIONS AND COMMENTS

It was confirmed that the additional funding offered through the Safety Valve Programme is to support the outstanding deficit and budget planning for future provision.

Schools are struggling to recruit qualified SENCOs – how will a support line be operated?

This will be a provision across Hampshire and IOW – with a full recruitment process. Some current SENCOs work part-time and may welcome additional hours.

Will the new special school only support secondary pupils?

Based on current data, it is likely that some provision will be needed for Years 5 and 6, with the main requirement being support for secondary pupils. The building would not be completed until 2025, so there is time to analyse the data and work on options to meet demand.

It was agreed that working to address historic poor support for SEN children has contributed to the ongoing budget deficit. Also noted that, on the IOW over 5% of children have EHCPs, against a national average of 4%. 10 years ago, 25% of IOW schools were judged inadequate, and there are none now.

Will LA Officers aim to attend 100% of EHCP reviews?

No, the focus will be on specific needs, where an EHCP requires change and where the child may be supported to become more independent.

Headteachers recently attended a presentation from the Speech, Language and Communication (SPLC) team. This would be very helpful for wider staff and could help to reduce demand on the Behaviour Support Service.

SPLC and other services, including Portage (home visits) and School Nurses, have provided great support post-covid and for Social Emotional and Mental Health (SEMH).

Work is ongoing with schools to underpin Keeping Children Safe in Education (KSiE) guidance and to avoid permanent exclusions, which are bound to affect their lives in the longer term. However, in some cases, suspension is necessary and right.

Knowing the children and working closely with families on a whole IOW approach should contribute to reducing exclusions.

Reactive training is key to 'getting it right'.

- 7.20 This being his last meeting with Schools Forum, BG thanked BP on behalf of forum members and HTs for all that he had done to support IOW schools and work with HTs and Officers on proposals for the Safety Valve Programme.

Action – Further updates to be brought to Schools Forum meetings as required. Copy of presentation to be circulated to HTs and included with these minutes

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

This report confirms funding arrangements for the next year following on from discussions at forum meetings in November 2022 and January 2023. The final funding formula was submitted to DfE in January, with no checks back and only small updates in relation to Business Rates.

- 8.1 Budget shares were sent out to schools on 24 January 2023, 5 weeks ahead of the required deadline. A meeting was held with School Business Managers (SBMs) to discuss budget pressures and inform planning for individual school budgets.

8.2 EARLY YEARS FORMULA 2023/24

Agreed funding rates are confirmed in the table at para 7. Further information on the government announcement, in relation to expanding the 30-hour funding to 1-2 year-olds and a possible increase to 2023/24 rates, is expected and will be reported in future meetings.

8.3 SPECIAL SCHOOLS AND PUPIL REFERRAL UNIT (PRU)

Both special schools and the PRU were consulted on distribution of the required funding increase (1.5% increase to the Minimum Funding Guarantee and 3.4% increased funding paid as a lump sum). Budget shares have been issued and increased rates will apply from 1 April 2023.

8.4 SAFETY VALVE PROGRAMME MARCH 2023

An update on progress with the Safety Valve Programme was covered in the presentation and at paras 7 – 7.20. Following extensive discussions with DfE, additional DSG funding of £12.7m was agreed to support ongoing work towards achieving a balance budget in 2027. The funding will be received in stages, subject to close DfE monitoring of progress. A breakdown is shown in the table at para 14.

- 8.5 In addition, DfE has approved construction of a new Special School for the IOW. Further bids for capital funding to develop the Primary Behaviour Service and Employability Hub are in progress.

8.5 QUESTIONS AND COMMENTS

It was confirmed that work on the resourced provision project is still underway. Further updates will be brought to Schools Forum in due course.

It was reassuring to know that schools won't have to contribute even more towards High Needs funding this year, especially as pupil numbers are decreasing.

RESOLVED

That the general updates in relation to 2023/24 schools and early years related funding be noted.

That the 2023/24 top up funding rates for special schools and pupil referral units be endorsed (7 for 0 against)

9. SCHOOL FUNDING POLICY PACK AND SCHEME FOR FINANCING SCHOOLS 2023/24 Paper D

Only minor housekeeping updates to the policy pack were reported and there is no change to the IOW Scheme for Financing Schools. The policies cover allocation of a range of funds – Growth Fund and Falling Rolls, Contingency Funding, SEN Cap, Split Sites and Over-Occupancy.

- 9.1 Appendix A includes each policy, with working examples, links to updated guidance and updated values - including Age Weighted Pupil Unit (AWPU).

- 9.2 Schools Forum is consulted and decides on the Growth Fund and funding for outstanding schools where pupil numbers were falling, but a rise is expected over the next 3 years.

- 9.3 Forum members had agreed that the Growth Fund was unaffordable for 2023/24 and set as a minimal balancing item at £326.

- 9.4 The Scheme for Financing Schools requires only housekeeping updates, including closure of the Salix energy efficiency loan scheme. The Scheme for Financing Schools may be revisited in-year, as DfE updates are received.

9.5 QUESTIONS AND COMMENTS

Noted that secondary schools may soon fall into the criteria for growth funding.

The situation will be monitored and discussed with Schools Forum over the next year. Schools Forum had agreed to follow the National Funding Formula (NFF) as closely as possible - moving funding to the Growth Fund would impact school budgets.

Agreed the situation is impossible and requires continuing discussion.

Rising pressure in relation to pupil needs/characteristics has been a main issue for budget-setting. Further discussion around funding factors and sector-specific arrangements will continue.

Agreed all schools are affected in different ways and budget-setting is a matter of juggling to support all.

Notwithstanding financial pressures, it would be helpful if a headteacher/school could be consulted in advance of a need to admit additional pupils.

This was due to an error in the admissions process – a sincere apology was offered and accepted.

Collective thanks was given to BP and BD, noting that both will be moving on after this meeting. Thanks also to other officers for what has been a huge journey of support and collaboration.

RESOLVED

That the continuation of the existing criteria for growth and falling rolls for 2023/24 detailed in Appendix A be approved (7 for 0 against)

That the minor housekeeping updates to the policy pack in Appendix A which will apply from 1 April 2023 be noted.

That the minor update to the Isle of Wight Scheme for Financing Schools applicable from 1 April 2023 be noted.

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

Thursday, 13 July 2023, from 8.30am

DATES OF FUTURE MEETINGS All at 8.30am

13 July 2023

17 November 2023

11 January 2024

21 March 2024