**Schools Forum Agenda**

Wednesday 29th November 2023, **Microsoft Teams**

**8.30am start**; break **10am** finish by **11am**.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | Author | Voting / Relevance | Page |
| 1 | Apologies for Absence (and substitute notices)  | Chair |  | 2 |

**Decision Papers**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 2 | Early Years Update | Carolyn Terry | All schools | 3 |
| 3 | School Funding 2024/25 | Yannick Stupples-Whyley | All schools | 9 |
| 4 | Scheme for Financing Schools | Yannick Stupples-Whyley | Maintained Schools | 15 |
| 5 | Constitution and Membership of Schools Forum | Yannick Stupples-Whyley | All schools | 17 |

**Confidential Decision Paper**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 6 | Future Plans for the School Meals Advisory Service | Gareth Honeyford / Yannick Stupples-Whyley | All schools | See separate report |

**Confidential Forum Business**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 7 | Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies | Chair | All schools | See separate report |

**Forum Business**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 8 | Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies | Chair | All schools | 28 |
| 9 | Minutes of 27th September 2023 | Chair | All schools | 33 |
| 10 | Minutes Action Log | Yannick Stupples-Whyley | All schools | 48 |

**Information Papers for Discussion**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 11 | Forward Plan | Yannick Stupples-Whyley | All schools | 49 |

**Closing Comments**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 12 | Closing Comments | Chair |  |  |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 1** |
| Date: 12 July 2023 |  |

Apologies for Absence

Please remember to mute your microphone when you are not speaking.

Anyone attending Schools Forum as an observer must stay silent throughout the meeting.

The professional headteacher representatives for EPHA, ASHE or ESSET are observers unless they are substituting for a headteacher or governor who cannot attend. Whilst observing they can only ask a question via a Forum member.

To ask a question or to comment on a paper please use the raise hand function. If you cannot use this function, please use the meeting chat.

The meeting chat will also be used for voting purposes. Please type:

* + Yes, if you agree the recommendation,
	+ No, if you do not agree the recommendation
	+ Abstain, if you do not wish to vote

The agenda and papers will not be shared on screen.

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 2** |
| Date: 29 November 2023 |  |

**REPORT TITLE: EARLY YEARS FUNDING 2023-24**

Report by Carolyn Terry

Contact details: Telephone (03330 136481); e-mail: Carolyn.terry@essex.gov.uk

**1. Purpose of report**

* 1. To update Forum on the forecast budget requirement for 2023/24 of the two, three & four year old Free Early Education Entitlement (FEEE).
	2. To seek approval to increase the level of funding retained from the Early Years Block to increase the number of staff in the central early years funding team to cover the increased workload caused by the Childcare Reforms expansion.
	3. To update Forum on the progress of the roll out of the Childcare Reforms Expansion.
	4. To update Forum on the spend to-date on the agreed funding projects.

**2. Recommendations**

2.1 That Forum notes the forecast outturn for 2023/24 at 5.1.

2.2 That Forum approves the request to increase the level of funding retained for 2024/25 as set out in 6.3.

2.3 That Forum notes the spend to-date on the agreed funding projects set out in 7.1.

###### 3. Relevant Schools Forum Power and Responsibility

3.1 Table 1 shows the relevant responsibilities in relation to Early Years which is taken from the Education and Skills Funding Agency’s Schools forum powers and responsibilities published in September 2018.

|  |  |  |
| --- | --- | --- |
| Local Authority | Schools Forum | DfE |
| Early Years Funding Formula – Proposes and Decides | Must be consulted | Checks compliance with regulations. |
| Retained Expenditure - Proposes | Decides | Adjudicates where Schools Forum does not agree local authority proposal. |

###### 4. Background

4.1 FEEE funding supports the statutory universal offer to all three- and four-year-olds and up to 40% of the least advantaged two-year-olds; these are children who meet predetermined eligibility criteria.

4.2 At the end of the Summer 2023 term report: -

* Across Essex, currently 20.7% of all two-year-olds are eligible to access the funding.
* The take-up of the two-year-old FEEE during the Summer 2023 term was 2,840, which was 83.21% of the 3,413 eligible two-year-olds in the county. This take-up figure remains significantly higher than the national take up level for the Summer 2023 term of 73.9%.
* The take up of the universal three- and four-year-old FEEE at the Summer term 2023 headcount was 25,735, which is 93.5% of the eligible three- and four-year-olds. This is slightly below the national take up % of 93.7%

**5. Financial Implications**

5.1 Table 2 shows the outturn forecast for 2023/24.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Budget£’000 | Forecast Outturn£’000 | Variance£’000 |
| 2 Year Olds | 8,697 | 8,697 | 0 |
| 3 & 4 Year Olds | 84,501 | 84,501 | 0 |
| Early Years SENCOs | 1,300 | 1,300 | 0 |
| EY Quadrant Teams | 788 | 743 | (45) |
| Quality & Improvement | 550 | 550 | 0 |
| Contingency | 139 | 139 | 0 |
| Education Service Recharge | 151 | 151 | 0 |
| Corporate Overheads | 401 | 401 | 0 |
| Total | **96,527** | **93,844** | **(45)** |

5.2 The underspend reflects vacant posts in the Quadrant Early Years teams.

5.3 The uplift in the rates from September 2023 is funded by the Early Years Supplementary Grant. The provisional allocation for 2023/24 is **£4.8 million**. Settings have been allocated £2.6 million for the Autumn Term which leaves **£2.2 million** for the Spring Term.

5.4 The Authority is proposing to increase staffing by 1.8 FTE posts at a cost of **£68,300** to ensure the team has capacity to implement the Childcare reforms. It is proposed to fund these posts by the Early years Block.

**6. Update on the roll out of the Childcare Reforms Expansion programme**

6.1 In the March 2023 budget, a package of measures was announced with the intended aim of reforming the childcare system and supporting more parents, specifically women, to enter or re-enter the workplace. Updates on progress is set out for each element below.

* 30 hours of free childcare for all children over 9 months from September 2025, introduced in phases from April 2024  -
	+ analysis being finalised on the number of new places that will be needed.
	+ capital programme being developed to support creation of new places.
	+ Communication plan being finalised to provide information, advice and guidance to both childcare providers and parents.
* Making changes to the statutory entitlement age to access early years SEN Inclusion funding from the current age range of 3 years old to from 9 months old.
	+ The work to implement a new early years SEN Inclusion Funding model from September 2024 will address this change and ensure ECC is compliant with its statutory responsibilities.

* Uplift in the funding paid to early years providers, including nurseries, pre-schools, childminders and school run early years provision, for the existing funded hour provision implemented from September 2023 –
	+ 3-and 4-years olds rate increased by £0.31 to £5.04 / funded hour
	+ 2 year old rates increased by £1.92 to £7.81 / funded hour.
	+ Maintained Nursey School supplement increased by £0.21 to £4.01 / funded hour.
	+ Early Years Pupil Premium increased by £0.04 to £0.66 / funded hour.
	+ Disability Access Fund increased by a pro-rata rate of £30.92 to £858.92 per annum (full year rate increase will be by £53.00)

* Funding for primary schools and local authorities to be used to establish wrap around childcare at the beginning and end of the school day for all schools by September 2026
	+ Audit being finalised on current provision.
	+ Mapping will be undertaken to identify areas where new places are needed.
	+ Briefing sessions will be rolled out this term to schools and third party providers.
	+ Information packs will be produced , including the data on needed places and registering with Ofsted.
	+ Business support will be in place to create new wraparound places and to apply for available funding.
	+ Facilitation of creating local partnership wrapround childcare models between schools, PVI and / or childminders
* Revision to Universal Credit childcare payments implemented so that these are paid upfront and not in arrears.
	+ This has been implemented by the DfE.

* Piloting of a scheme to provide incentive payments to encourage people to sign up as childminders being rolled out (£600 per childminder or £1,200 if signing up via a childminder agency)
	+ This is being promoted via the ECC Early Years Recruitment campaign.

**6.2** Delivery of the Childcare Reforms expansion is generating a significant increased workload and will require a fixed term increase in staffing levels in the Early Years and Childcare Sufficiency and Sustainability team for this work to be covered. The DfE are providing Capacity funding to all LAs to support with these additional costs for the implementation period and ECC will be utilising this funding to bring capacity for marketing and communication, early years and childcare business management support and project support.

6.3 These reforms will also create significant additional workload pressures on the Early Years and Childcare Sufficiency and Sustainability team on a permanent basis. The current team establishment is insufficient to meet these increased workloads, therefore we are requesting to increase the amount of funding ECC retains from the Early Years Block by £68,317 to cover the cost of recruiting to the following two posts on a permanent basis from April 2024: -

* Early Education Entitlement Funding Officer – Band G term time only - **£28,613** including on-costs.
* Early Years SEN Inclusion Funding Officer – Band G - **£39,154** including on-costs.

**7. Update on spend against Early Years Block underspend proposals**

7.1 Table 3 below provides an update on the progress and financial commitment against each of the agreed projects to date: -

|  |  |  |
| --- | --- | --- |
| Proposal   | Total Cost  | Update |
| Creation of 4 Early Years Early Intervention Partner (EYEIP) full time posts for a time limited period of 24 months, with a possibility of a 1 year extension All 4 posts in place from September 2023 | Total **£550,000** over 2 years | Full EYEIP team started in September 2023EYEIP resource being allocated instead of inclusion funding where application / child’s needs being presented as transient delay rather than emerging SEND.Thirty applications diverted to EYEIP support rather than funding to date  |
| 1fte of temporary increased staffing levels to Early Years Sufficiency and Sustainability team To provide additional business management consultancy and childcare sufficiency staffing support to early years sector for 2 years   £60,000 x 2 years Staffing in place from June 2023 |  Total **£120,000** | Additional resource in place and providing additional capacity to cover the increased level of need from the early years sector.£60,000 will be allocated in Year 1 |
| Speech and Language Club On-line resource by SALT specialists in the six levelling up areas. TargetForty-two settings and five hundred children and their families supported through the setting, along with up to ten additional direct support for parents. Supplier:  Essex Speech Club. First tranche implemented from summer 2023 |        Total **£94,500** | First tranche of support rolled out in Colchester with seven settings.Overall feedback so far has been extremely positive. Children are responding well to the sessions, practitioners are learning strategies to use outside of the intervention, the resources provided saves the practitioners preparation time, and when they need specific advice, the company is available over the phone and to visit face to face. The programme compliments Essex’s training and interventions that are already embedded in the settings. Roll out underway to other districts.Commitment to date £78,750 |
| Continuation of Speech and Language Club following a 1-year review Should the project show success, a further 2–3-year funding, continuation and expansion of the Speech and Language Club. Potential for collaboration with Health colleagues and/or the High Needs Block.  |       Total **£350,000** | Not due for roll out yet |
| Help for sufficiency of disadvantaged EY settings. Funding for Early Years settings in levelling up and disadvantaged areas to help provide sufficiency and longevity in tough times. The settings would be distinguished through location, and if the setting is the only option for families in the area to access their funded place. Funding implemented from start of the Autumn 2023 Term |        Total **£750,000** | To-date five settings have been supported with a sufficiency grant to provide financial support to overcome short term cashflow issues and / or time needed to amend business models to become sustainable.More settings are coming forward this term asking for support.£88,000 committed so far |
| Talk listen and cuddle is a platform for parents that provide information, advice and guidance. Potential to offer improvement and expansion of this platform and to allow access to more parents.  |     Total **£50,000** | Tender about to commence to source company to lead this development on behalf of ECC.Contract value up to a maximum of £50,000 |
| Recruitment and retention support  Work underway to put together a package to support the early years sector. Access to free access to ECC Jobs site from September 2023Marketing Recruitment Campaign launched 4 October 2023 |  Total **£300,000** | Targeted 11 month marketing campaign launched - **#‘Make a change. Build a future.’** [https://www.essex.gov.uk/news/2023/new-recruitment-campaign-launched-early-years-practitioners](https://eur02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.essex.gov.uk%2Fnews%2F2023%2Fnew-recruitment-campaign-launched-early-years-practitioners&data=05%7C01%7CCarolyn.Terry%40essex.gov.uk%7C4ef67ac466f740c0d52c08dbc4ef39e3%7Ca8b4324f155c4215a0f17ed8cc9a992f%7C0%7C0%7C638320303970276321%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=pyr%2BgjgVoyJw0FuRuj2pDRdOvYnIpMynBxVoCYxiEeY%3D&reserved=0) The Make a change. Build a future campaign aims to: * raise awareness of early years and childcare as a career option, while promoting training routes and progression opportunities
* encourage qualified Level 2 and Level 3 practitioners to return to the sector.
* raise awareness of the flexibility and opportunities available for those interested in becoming a registered childminder in Essex.

EYCC providers given 12 months free access to the ECC Schools Job Vacancy site to advertise their job roles and being given advice on advert content etc and to provide central place to signpost interested candidates to from marketing campaign to find vacancies.Spend to date.Recruitment Campaign - £85,000Job site access - £24,000 |

**8. Schools Forum Early Years and Childcare Reference Group**

8.1 The Schools Forum Early Years and Childcare Reference Group has continued to meet during 2023, with ongoing representation from all early years’ sector types and each district.

The key areas of discussion have continued to be around the following areas: -

* Increasing number of early years children with emerging additional needs that need more support, alongside concerns over the level of support the sector is receiving for children with SEND from ECC.

The introduction of the four new Early Years Early Intervention Partner roles alongside the work to introduce a new SEN Inclusion Funding process form September 2024 will support with addressing these concerns.

* Financial pressures on the economy such as increases to the national minimum wage, NI contributions, utility, and food costs, which are causing sustainability concerns for the early years sector.
* Recruitment and retention of qualified staff is continuing to be an increasing issue for the early years sector; however, the new recruitment and retention programme has been launched to support this area of need.

8.2 Future meetings have been scheduled to coincide with reporting to Schools Forum

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 3** |
| Date: 29 November 2023 |  |

**REPORT TITLE: SCHOOL FUNDING 2024/25**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330 138464); e-mail: yannick.stupples-whyley@essex.gov.uk

**1. Purpose of report**

1.1 To update Schools Forum on the changes to the provisional School Funding Settlement for 2024/25 announced on 6th October 2023, the outcome of the school funding consultation and the Authority’s final proposals for 2024/25.

**2. Recommendations**

2.1 To note the revised provisional funding settlement for 2024/25.

2.2 To note the results of the school funding consultation at 6.2

2.3 To agree the recommendation of the FRG to approve the final proposed changes to the Essex Formula for Funding Schools for 2024/25 at 6.8

###### 3. Relevant Schools Forum Power and Responsibility

3.1 Table 1 shows the relevant responsibilities in relation to formula change which is taken from the Education and Skills Funding Agency’s **Schools forum powers and responsibilities** published in September 2018.

|  |  |  |
| --- | --- | --- |
| Local Authority | Schools Forum | DfE |
| Proposes | Must be consulted. Voting is restricted to School members plus the Early Years PVI member. | Checks for compliance with regulations. |

###### 4. Background

4.1 The Permanent Secretary, wrote to the Chair of the Education Select Committee on 6th October 2023 to announce an error in the calculation of the Schools National Funding Formula (NFF) due to an under estimation of pupil numbers.

4.2 Although an error has occurred the overall funding remains at **£59.6 billion**, however unit values for the majority of NFF funding factors have been reduced.

 **Schools Block**

4.3 At a national level the Schools Block has increased by 1.9% down from the announced 2.75% in July 2023. Table 2 shows the provisional allocation for Essex at July and the revised provisional allocation announced in October 2023.

|  |  |  |  |
| --- | --- | --- | --- |
|  | July 2023£m | October 2023 £m | Change£m |
| Schools Block 2023/24 | 1,090.6 | 1,090.6 | 0 |
| Mainstream Schools Additional Grant 2023/24 | 37.1 | 37.1 | 0 |
| 2023/24 Baseline | 1,127.7 | 1,127.7 | 0 |
| Provisional Schools Block 2024/25 | **1,159.4[[1]](#footnote-1)** | **1,148.9** | **(10.5)** |
| Provisional Increase | 31.7 | 21.2 | (10.5) |
| % Increase | 2.83% | 1.87% | (0.96%) |

4.4 It can be seen the revised provisional allocation decreases by **£10.5 million**.

4.5 Schools will receive additional funding for the agreed teachers’ pay rise through the Teachers’ Pay Additional Grant which is estimated at **£19.1 million** for 2024/25. This is unaffected by the October announcement.

4.6 Table 3 shows the unit values of each formula factor in the Schools NFF for 2024/25.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | 2024/25July 2023£ | 2024/25October 2023£ | Change£ | % Change |
| Basic Entitlement:PrimaryKS3KS4 | 3,597.005,072.005,717.00 | 3,562.005,022.005,661.00 | (35.00)(50.00)(56.00) | (1.0)(1.0)(1.0) |
| FSM:PrimarySecondary | 490.00490.00 | 490.00490.00 | 00 | 0.00.0 |
| FSM6:PrimarySecondary | 830.001,210.00 | 820.001,200.00 | (10.00)(10.00) | (1.2)(0.8) |
| IDACI:Primary Band FPrimary Band EPrimary Band DPrimary Band CPrimary Band BPrimary Band ASecondary Band FSecondary Band ESecondary Band DSecondary Band CSecondary Band BSecondary Band A | 235.00285.00450.00490.00520.00685.00345.00455.00635.00695.00750.00950.00 | 235.00285.00445.00485.00515.00680.00340.00450.00630.00690.00740.00945.00 | 00(5.00)(5.00)(5.00)(5.00)(5.00)(5.00)(5.00)(5.00)(10.00)(5.00) | 0.00.0(1.1)(1.0)(1.0)(0.7)(1.4)(1.1)(0.8)(0.7)(1.3)(0.5) |
| Low Prior Attainment:PrimarySecondary | 1,185.001,790.00 | 1,170.001,775.00 | (15.00)(15.00) | (1.3)(0.8) |
| EAL:PrimarySecondary | 595.001,605.00 | 590.001,585.00 | (5.00)(20.00) | (0.8)(1.2) |
| Mobility:PrimarySecondary | 970.001,395.00 | 960.001,380.00 | (10.00)(15.00) | (1.0)(1.1) |
| Lump Sum | 135,700 | 134,400 | (1,300) | (1.0) |
| Sparsity:[[2]](#footnote-2)PrimarySecondary | 57,70083,900 | 57,10083,000 | (600.00)(900.00) | (1.0)(1.1) |
| Split Sites:Basic EligibilityDistance Eligibility | 54,30027,100 | 53,70026,900 | (600.00)(200.00) | (1.1)(0.7) |

**High Needs Block and Central School Services Block**

4.7 The High Needs Block provisional allocation remains at **£238.5 million** unchanged from the July announcement. The Central Schools Block provisional allocation remains at **£11.6 million** also unchanged from the July announcement.

**5. Proposed Changes to the Essex Funding Formula 2024/25**

5.1 The original proposals agreed by Schools Forum in September 2023 were:

* To fund schools using the Essex non-fringe area cost adjustment uplift for 2024/25 to ensure all schools receive funding based on the geographic cost pressures.
* To increase the London Fringe allowance from 1.0156 to 1.0251 which is halfway between 1.0156 and 1.0345.

5.2 Due to the reduction of **£10.5 million** the Authority, with the approval of the Chair and Vice-Chair, has amended the second proposal and will now increase the London Fringe weighting from 1.0156 to 1.0173, which is the minimum allowed increase for 2024/25.

5.3 Forum is aware the Authority is set a minimum and maximum that each formula factor’s value must be within. With the reduction in the provisional allocation the KS4 basic entitlement value is close to the breaching the maximum value allowed. When calculating final budget allocations, should either the KS3 or KS4 basic entitlement value breach the minimum or maximum values allowed the Authority will be required to adjust the KS3 / KS4 basic entitlement weighting.

5.4 The provisional KS4 basic entitlement value is £5,817.40 compared to the maximum allowed of £5,826.89.

**6. Consultation**

6.1 The consultation was launched on Monday 2nd October. It was briefly redacted on 10th October, whilst the Authority assessed the options to lessen the impact on schools. The consultation was relaunched on 13th October and closed on 5th November.

6.2 Table 4 shows the number of schools that responded to the consultation.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Total Schools | No. of Responses | %Response |
| Primary | 445 | 23 | 5.2 |
| All-Through | 2 | 0 | 0.0 |
| Secondary | 79 | 0 | 0.0 |
| Total | **526** | **23** | **4.4** |

6.3 Chart 1 shows the response to the proposal to uplift the NFF formula values by the Essex non-fringe area cost adjustment to ensure all schools receive funding based on geographic cost pressures.

6.4 It can be seen in chart 1 that a significant majority of responses (78.3%) support the proposal.

6.5 Chart 2 shows the response to the proposal to increase the London weighting multiplier from 1.0156 to 1.0173. Of the 23 responses received, 20 responses were received before the proposal was revised after the reduction in the provisional allocation. The Authority proposes to count these responses as they were responding on an increase to the London weighting multiplier.

6.6 It can be seen in chart 2 that a significant majority of responses (78.3%) support the proposal.

6.7 The Authority’s final proposals are:

* To fund schools using the Essex non-fringe area cost adjustment uplift for 2024/25 to ensure all schools receive funding based on the geographic cost pressures.
* To increase the London Fringe allowance from 1.0156 to 1.0173 which is the minimum allowed increase for 2024/25.
* To adjust the KS3 / KS4 basic entitlement weighting, if required to meet the minimum / maximum requirements of the DfE.

6.8 The Finance Review Group has reviewed the consultation response and the Authority’s final recommendations and recommends that Schools Forum agrees the Authority’s proposed changes to the Essex Formula for Funding Schools for 2024/25 as outlined in 6.7.

**7. Financial Implications**

7.1 The financial implications are embedded in the report.

**8. Background / Supporting papers.**

8.1 The provisional settlement including technical notes can be found using the following link: [National funding formula tables for schools and high needs: 2024 to 2025 - GOV.UK (www.gov.uk)](https://www.gov.uk/government/publications/national-funding-formula-tables-for-schools-and-high-needs-2024-to-2025?utm_medium=email&utm_campaign=govuk-notifications-topic&utm_source=cd70bfec-7412-4d5f-b5aa-779fd46aa4a9&utm_content=immediately)

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 4** |
| Date: 29 November 2023 |  |

**REPORT TITLE: SCHEME FOR FINANCING SCHOOLS 2024/25**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330 138464); e-mail: yannick.stupples-whyley@essex.gov.uk

**1. Purpose of report**

1.1 To update Schools Forum on the proposed changes to the Scheme for Financing Schools for 2024/25.

**2. Recommendations**

2.1 To note the updates to the Scheme from previous prescribed changes at 4.6, 4.7 and 4.8, which require no consultation.

2.2 To agree the Finance Review Group’s recommended changes to the Scheme for Financing Schools for 2024/25 at 4.4, 4.5, 4.9, 4.10 and 4.11.

###### 3. Relevant Schools Forum Power and Responsibility

3.1 Table 1 shows the relevant responsibilities in relation to de-delegation and education functions, which are taken from the Education and Skills Funding Agency’s **Schools forum powers and responsibilities** published in September 2018.

|  |  |  |  |
| --- | --- | --- | --- |
| Function | Local Authority | Schools Forum | DfE |
| Scheme for Financing Schools | Proposes and Consults | Approves (maintained school members only) | Adjudicates where Schools Forum does not agree local authority proposal. |

###### 4. Background

4.1 Local authorities are required to publish a scheme for financing schools, setting out the financial relationship between them and the schools they maintain.

4.2 The Secretary of State may by a direction revise the whole or any part of the scheme from such date as may be specified in the direction.

4.3 The proposed changes for 2024/25 are outlined below.

 Interpretation

4.4 The date of the relevant Schools and Early Years Finance (England) Regulations is updated to 2024.

 Section 2.3.1 – Submission of Financial Forecasts

4.5 The starting date for schools to submit a 3 year budget plan has been removed as it has passed.

Section 2.4 – School Resource Management

4.6 The DfE has renamed this section from Value for Money to School Resource Management. The text is updated to the latest DfE version based on the last directed change.

 Section 2.9 – Register of Business Interests

4.7 The text is updated to the latest DfE version based on the directed change for this section.

Section 2.10 – Purchasing, Tendering and Contracting Arrangements

4.8 Reference to the EU Procurement Directive is removed.

 Section 3.2 – Proportion of Budget Share Payable at Each Instalment

4.9 Reference to all maintained schools becoming local bank schools is removed as the date has passed.

Section 3.3 – Interest Clawback

4.10 Removes the reference for schools opting for local bank accounts as schools are required to have a local bank account.

 Annex A

4.11 Schools that have converted to academies since the last update are removed as they are no longer covered by the Scheme.

4.12 FRG has considered the proposed changes and recommend that Schools Forum approves recommendation 2.2 without the need to consult schools as they will not be adversely affected by any of the changes.

**5. Financial Implications**

5.1 There are no financial implications.

**6. Other Resource Implications**

**7. Consultation with stakeholders**

**8. Background / Supporting papers.**

8.1 Annex A – Tracked changed Scheme for Financing Schools

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5** |
| Date: 29 November 2023 |  |

**REPORT TITLE: CONSTITUTION AND MEMBERSHIP OF SCHOOLS FORUM**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330) 138464; e-mail:

yannick.stupples-whyley@essex.gov.uk

**1. Purpose of report**

* 1. To consider the current membership of the Schools Forum in the light of the continuing transfer of maintained schools to the Academy sector and the change in pupil numbers.

**2. Recommendations**

* 1. To approve the Authority’s preferred approach for implementing the required change to primary members at 3.10.
	2. To note members who will reach their end of term at 3.12.
	3. To note Membership at Annex A and Attendance at Annex B.

**3. Background**

3.1 Schools Forum approved a mix of both in person and remote meetings at the May 2021 meeting following the change to the Schools Forum Regulations allowing the use of remote meetings on a permanent basis.

3.2 At the meeting of 17 May 2023 Schools Forum approved to move the in-person meeting from January to May on a permanent basis.

* May – in person
* July – remote
* September – in person
* November – remote
* January – remote

3.3 All sub-group meetings will be held remotely.

3.4 Table 1 shows the agreed structure Forum approved in December 2020:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Maintained Schools | Academies | Total |
| Primary | 5 | 5 | 10 |
| Secondary | 1 | 6 | 7 |
| Special | 1 | 1 | 2 |
| PRUs | 1 | 1 | 2 |
| Nursery | 1 | - | 1 |
| Non School Members |  |  | 6 |
| Total | **9** | **13** | **28** |

3.5 T able 2 shows the ratio of pupils between primary and secondary schools as at the May Census 2023.

|  |  |  |
| --- | --- | --- |
|  | Pupils | Ratio |
| Primary | 120,012 | 1.45 |
| Secondary | 82,670 | 1.00 |

3.6 The ratio between primary and secondary pupils is 1.45:1 which requires no change to the number of primary and secondary representatives.

3.7 Table 3 shows a breakdown of pupils for primary and secondary between maintained schools and academies as at the May Census 2023.

|  |  |  |  |
| --- | --- | --- | --- |
|  | No. of Schools | Pupils | % Split |
| PrimaryMaintainedAcademiesTotal Primary | 213234**447** | 53,73666,276**120,012** | 44.7%55.3%**100%** |
| SecondaryMaintainedAcademiesTotal Secondary | 477**81** | 3,83478,836**82,670** | 4.6%95.4%**100%** |

3.8 The recent academy conversions have moved the primary pupil split in Table 3 between maintained schools and academies from five members each to four maintained members and six academy members.

3.9 There are 3 possible ways to achieve the change in primary membership required at 3.8.

* To seek the resignation of a primary maintained member and to elect a new primary academy member.
* To cease the position of the next maintained member to come to their end of term and at that date elect a new academy member.
* To transfer a primary maintained governor to a primary academy governor, if any maintained governors are also a governor of an academy.

3.10 The preferred approached is to hold the current structure of 5 maintained members and 5 academy members until the next maintained member reaches their end of term at the July meeting. If the member wishes to continue on Forum an election will be held.

3.11 A full list of members is shown at Annex A.

3.12 Table 4 shows the members who within the next twelve months will reach the end of their current term of office.

|  |  |
| --- | --- |
| Name | Last Meeting |
| Luke Bulpett | 10th July 2024 |
| Debs Watson | 27th November 2024 |
| Lyn Wright | 27th November 2024 |
| Ruth Sturdy | 27th November 2024 |
| Jo Santinelli | 27th November 2024 |

3.13 Details of attendance are shown at Annex B for Schools Forum, the SEN Sub-Group, the Finance Review Group and the Early Years Sub-Group. It can be seen in Annex B; two members have breached the terms and conditions where they must attend at least one of three consecutive meetings. It was agreed during the pandemic not to penalise non-attendance, however

**4. Financial Implications**

4.1 There are no financial implications.

**5. Other Resource Implications**

**6. Consultation with stakeholders**

**7. Background / Supporting papers.**

7.1 Annex A – School Forum Membership

7.2 Annex B – Schools Forum Attendance

 **Annex A**

**School Forum Members (November 2023)**

 **Maintained Schools:**

**Primary School Headteachers**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Sue Bardetti | Holland Haven Primary School | November 2021 to November 2025 |
| Luke Bulpett | Brightside Primary School | July 2020 to July 2024 |
| Jinnie Nichols | St Giles’ & St Andrew’s CE Primary Schools | September 2021 to September 2025 |

**Primary School Governors**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Nigel Hill | John Bunyan Primary | November 2022 to November 2026 |
| Claire Styles | Trinity Road Primary | September 2021 to September 2025 |

**Secondary School Governors**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Sean Moriarty | St Benedict’s Catholic College | November 2022 to November 2026 |

**Special School Headteachers**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Simon Wall | Lexden Springs | May 2023 to May 2027 |

**Pupil Referral Units**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Jo Barak | CSS South | September 2021 to September 2025 |

**Maintained Nursery Schools**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Debs Watson | Tanglewood Nursery School | November 2020 to November 2024 |

**Academies / Free Schools:**

**Primary**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Robin Taverner | St Mary’s Primary, Woodham | July 2022 to July 2026 |
| Rod Lane | Lakelands Primary School | January 2023 to January 2027 |
| Harriet Phelps-Knights | Janet Duke Primary School | May 2022 to May 2026 |
| Richard Potter | Home Farm Primary School | May 2023 to May 2027 |
| John Hunter | Felmore Primary | September 2023 to September 2027 |

**Secondary**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Ruth Bird (Chair) | The Chelmsford Learning Partnership | January 2023 to January 2027 |
| Dan Leonard | West Hatch High School | May 2023 to May 2027 |
| Stuart Roberts | Shenfield High School | July 2022 to July 2026 |
| James Saunders | Honywood School | November 2022 to November 2026 |
| Lyn Wright | Sigma Trust | November 2020 to November 2024 |
| Jody Gee | Anglo European School | November 2022 to November 2026 |

**Special**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Ruth Sturdy | SEAX Trust | November 2020 to November 2024 |

**Pupil Referral Units**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Philomena Cozens | Keys Co-operative Academy Trust | July 2023 to July 2027 |

**Non-School Members**

|  |  |  |
| --- | --- | --- |
| **Name** | **Representation** | **Term of Membership** |
| Jeff Fair (Vice-Chair) | Teaching Unions Rep | January 2022 to January 2026 |
| Scott Bowak | 16-19 teaching institutions | January 2023 to January 2027 |
| Charlotte Little | Anglican Church Rep | May 2023 to May 2027 |
| Jo Santinelli | Roman Catholic Church Rep | November 2020 to November 2024 |
| Chanel Lassman | PVI | May 2022 to May 2026 |
| Marilyn Smith | Support Staff Unions Rep | September 2021 to September 2025 |

 **Annex B**

**School Forum Attendance**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **11th** **Jan****2023** | **17th May 2023** | **12th July 2023** | **27th Sept 2023** | **% Attendance** | **% Attendance incl. Sub** |
| Ruth Bird (Chair) | Yes | Yes | Yes | Yes | 100 | 100 |
| Jeff Fair (Vice – Chair) | Yes | Yes | Yes | Yes | 100 | 100 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 | 100 |
| Luke Bulpett | Yes | Yes | Sub | No | 50 | 75 |
| Jinnie Nichols | Yes | Yes | Yes | Sub | 75 | 100 |
| Nigel Hill | Yes | Yes | Yes | Yes | 100 | 100 |
| Claire Styles | No | Yes | Yes | Yes | 75 | 75 |
| Sean Moriarty | Yes | Yes | Yes | Yes | 100 | 100 |
| Simon Wall | No | Sub | Yes | Sub | 25 | 75 |
| Jo Barak | Yes | Yes | Yes | Yes | 100 | 100 |
| Debs Watson | Yes | Yes | Sub | Yes | 75 | 100 |
| Harriet Phelps-Knights | Yes | Yes | Yes | Yes | 100 | 100 |
| Richard Potter |  | Yes | Yes | Yes | 100 | 100 |
| John Hunter | Yes | Yes | Yes | Yes | 100 | 100 |
| Rod Lane | Yes | Yes | Yes | Yes | 100 | 100 |
| Robin Taverner | Yes | Yes | Yes | Yes | 100 | 100 |
| Lyn Wright | Yes | Yes | Yes | Yes | 100 | 100 |
| Dan Leonard |  |  |  |  | N/A | N/A |
| Ruth Sturdy | Yes | Yes | Yes | No | 75 | 75 |
| Jody Gee | Yes | Yes | Yes | Yes | 100 | 100 |
| James Saunders | Sub | Sub | Yes | Sub | 25 | 100 |
| Stuart Roberts | Yes | Yes | Yes | No | 75 | 75 |
| Philomena Cozens | Yes | No | Yes | No | 50 | 50 |
| Chanel Lassman | Yes | No | Yes | No | 50 | 50 |
| Marilyn Smith | Yes | Yes | Yes | Yes | 100 | 100 |
| Charlotte Little |  |  |  |  | N/A | N/A |
| Jo Santinelli | Yes | No | Yes | Yes | 75 | 75 |
| Scott Bowak |  | No | No | Yes | 33 | 33 |

**High Needs Review Group Attendance**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **2nd Nov 2022** | **20 June****2023** | **13 Sept****2023** | **% Attendance** |
| Jeff Fair (Chair) | Yes | Yes | Yes | 100 |
| Rod Lane | Yes | Yes | Yes | 100 |
| Sue Bardetti | No | Yes | Yes | 67 |
| Luke Bulpett | Yes | Yes | Yes | 100 |
| Harriet Phelps-Knights | Yes | No | Yes | 67 |
| John Hunter | Yes | Yes | Yes | 100 |
| Pam Langmead | Yes | Yes | No | 67 |
| Ruth Bird | Yes | Yes | Yes | 100 |
| Carole Herman | No | Yes | Yes | 67 |
| Ruth Sturdy | Yes | Yes | Yes | 100 |
| Simon Wall | Yes | Yes | No | 67 |
| Emily Welton | No | Yes | No | 33 |
| Philomena Cozens | Yes | Yes | Yes | 100 |
| Jo Barak | Yes | Yes | Yes | 100 |
| Scott Bowak / Amanda Thurston | Yes | Yes | Yes | 100 |

**Finance Review Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **25th April 2023** | **20th June 2023** | **13th Sept 2023** | **13th Nov 2023** | **% Attendance** |
| Jeff Fair (Chair) | Yes | Yes | Yes | Yes | 100 |
| Rod Lane | Yes | Yes | Yes | No | 75 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 |
| Harriet Phelps-Knights | Yes | No | Yes | Yes | 75 |
| John Hunter | Yes | Yes | Yes | Yes | 100 |
| Nigel Hill | Yes | Yes | Yes | Yes | 100 |
| Pam Langmead | No | Yes | No | Yes | 50 |
| Ruth Bird | No | Yes | Yes | Yes | 75 |
| Sean Moriarty | Yes | Yes | Yes | Yes | 100 |
| Carole Herman | Yes | Yes | No | Yes | 75 |
| Jo Barak |  |  |  | Yes | 100 |

**Early Years Sub-Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **8th December 2022** | **4th May****2023** | **15th June 2023** | **21st Sept 2023** | **% Attendance** |
| Chanel Lassman (Chair) | No | Yes | Yes | Yes | 75 |
| Rod Lane | Yes | Yes | Yes | Yes | 100 |
| Samantha Cottrill | No | No | Yes | Yes | 50 |
| Maggie Catmull | No | No | Yes | Yes | 50 |
| Helen Taylor (Vice-Chair) | Yes | No | Yes | No | 50 |
| Jo Gridley | Yes | No | No | No | 25 |
| Annalei Smith | Yes | Yes | Yes | Yes | 100 |
| Lisa Rozee | Yes | Yes | Yes | Yes | 100 |
| Linda Reynolds | Yes | No | No | Yes | 50 |
| Helen Hill | No | Yes | Yes | No | 50 |
| Jennie Gregory | No | Yes | No | No | 25 |
| Kelly Stallwood | Yes | No | No | Yes | 50 |
| Zoe Orr | No | No | Yes | No | 25 |
| Tina Carnegie- Dielhenn | Yes | No | Yes | No | 50 |
| Ferliene Willis | No | No | No | Yes | 25 |
| Catherine Hamilton | Yes | No | Yes | Yes | 75 |
| Claire Owers | No | Yes | No | Yes | 50 |
| Sharlin Paul | No | No | Yes | Yes | 50 |
| Michelle Wisbey | Yes | Yes | Yes | No | 75 |
| Vicki Wellen | No | Yes | No | Yes | 50 |
| Dawn Saunders | No | No | Yes | No | 25 |
| Michelle Boreham | No | Yes | No | No | 25 |
| Claire Macklin | Yes | Yes | Yes | No | 75 |
| Dawn Saunders | Yes | No | No | Yes | 50 |
| Gaynor Baker | Yes | Yes | Yes | Yes | 100 |
| Angie Owen | Yes | No | Yes | No | 50 |
| Ruth Edwards | No | Yes | Yes | No | 50 |
| Rhianna Dyson | No | No | Yes | Yes | 50 |
| Sian Turner | No | No | No | Yes | 25 |
| Angie Craig | No | No | No | Yes | 25 |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 6** |
| Date: 29 November 2023 |  |

**REPORT TITLE: FUTURE PLANS FOR THE SCHOOL MEALS ADVISORY SERVICE**

See separate confidential report.

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 7** |
| Date: 29 November 2023 |  |

**REPORT TITLE: CONFIDENTIAL MINUTES OF THE FINANCE REVIEW GROUP – 13th NOVEMBER 2023.**

See separate confidential report.

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 8** |
| Date: 29 November 2023 |  |

Any Other Business and Feedback from Associations and Other Forum Members

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 8a** |
| Date: 29 November 2023 |  |

**Finance Review Group Minutes of 13th November 2023**

**Microsoft Teams**

**13:30 – 14:43**

*(subject to approval)*

In Attendance

|  |  |  |
| --- | --- | --- |
| Jeff Fair (JF) – Chair | Ruth Bird (RB) | Sue Bardetti (SB) |
| John Hunter (JH) | Harriet Phelps-Knights (HP-K) | Nigel Hill (NH) |
| Sean Moriarty (SM) | Pam Langmead (PL) | Carole Herman (CH) |
| Jo Barak (JB) |  |  |
| **LA Officers** |  |  |
| Clare Kershaw (CK) | Yannick Stupples-Whyley (YSW) |  |

|  |  |
| --- | --- |
| **1** | **Apologies for Absence and substitute notices**Jeff Fair welcomed everyone to the meeting. Apologies have been received from Rod Lane due to not internet connection. |
| **3** | **School Funding 2024/25 (Yannick Stupples-Whyley)**YSW introduced the report setting out the changes to the Schools NFF due to the under estimation of pupil numbers, the results of the school funding consultation and the Authority’s final proposals for 2024/25.**Questions**There were no questions.JF added it would be useful regarding the potential breach to have an indication of the gap.**Recommendations**:2.1 To note the revised provisional funding settlement for 2024/25.2.2 To note the results of the school funding consultation at 6.2 2.3 To recommend to Schools Forum to approve the final proposed changes to the Essex Formula for Funding Schools for 2024/25 at 6.7 FRG approved the recommendation. |
| **4.** | **Scheme for Financing Schools 2024/25 (Yannick Stupples-Whyley)**YSW introduced the report highlighting the proposed changes to the Scheme for Financing Schools for 2024/25.**Questions**There were no questions.JF added it would be worth to have a quick read of Annex A the full document to see the changes and recommended the changes are agreed without consulting schools as the changes were minor.**Recommendations**:2.1 To note the updates to the Scheme from previous prescribed changes at 4.6, 4.7 and 4.8, which require no consultation.2.2 To recommend that Schools Forum approves the changes to the Scheme for Financing Schools for 2024/25 at 4.4, 4.5, 4.9, 4.10 and 4.11. FRG approved the recommendation. |
| **5.** | **School and Academy Balances 2024/25 (Yannick Stupples-Whyley)**JF commented that it was concerning to see in writing that schools are holding two months of salary costs because the Government may go bust.YSW introduced the paper setting out the responses received from schools who had been contacted concerning holding revenue balances in excess of 30% of their funding.**Questions**SB asked did we look into the school that had over £800,000 and is now showing £1?YSW responded that it was due to the Trust pooling balances and not reporting individual balances per school.JF added it was the Government’s view of transparent financial reporting.CK clarified we had agreed to calculate a balance for these school on a pro-rata by pupil number basis to assess if balances were high. It will not be accurate but will give an assessment if balances are high.NH commented that he was surprised and confused that an academy chain thinks it should be excluded because they are funded from the high needs block.JF commented that he is not sure that people have understood this. It is a large political hot potato and that is why Councillors want information to be able to do a political argument.CK added that this raises further questions and asked how we take this forward. JF added it feels there is a strategic plan in that we do not spend money in case you have additional costs, which is not good financial planning for any school. They are holding on to money to offset costs that will be mainly offset by the £19.2m teacher’s pay grant.JF added it would be helpful if CK, YSW and Andrew Page could get together to see what questions we should be asking.NH commented that he did not feel the responses have not given much insight, we made need to have more targeted questions in order to get better insight.JF stated that it doesn’t help councillors in their argument for greater funding for schools within Essex.JH stated that academies that pool their resources if you then do a division, it may take schools below the threshold on average.CK stated we should digest the information and it feels more comfortable to come back to FRG before going back to Forum otherwise it will raise more questions again.JF agreed that would be his recommendation. In terms of Forum, we report FRG has received some initial responses which we are now looking into further because it has raised significant concerns.JF put this recommendation to the groupSB commented it should be all schools with high balances.CK clarified whether this meant going back to chase schools that haven’t replied.SB responded it was schools that are not on the list where we know they have high balances where funding has been pooled. You cannot have a comparison unless you’ve got everybody. A pro-rate by pupil numbers would be really helpful.JF responded we are not trying to do a comparison. We are trying to get an understanding of what the situation is for political purpose because actually we're trying to trying to justify the comments that we hear around the forum table every time that there is insufficient funding, you've got to be able to justify that.FRG agreed the recommendation to provide an update to Forum. |
| **6.** | **Any Other Business (Jeff Fair)**There was no other business |
| **7.** | **Closing Comments (Jeff Fair)**JF thanked members for their time and looked forward to seeing everyone at Schools Forum. |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 9** |
| Date: 29 November 2023 |  |

**Schools Forum Meeting Minutes of 27th September 2023**

**held at the Hamptons Sports & Leisure, Tydemans, Beehive Lane, Great Baddow, Chelmsford CM2 9FH.**

**08.30 – 10.45**

*(subject to forum approval)*

In Attendance

|  |  |  |
| --- | --- | --- |
| Ruth Bird – Chair | Jo Barak (JB) | Jody Gee (JGe) |
| Jeff Fair (JF) | Carole Herman (CH) | Scott Bowak (SB) |
| Sean Moriarty (SM) | Debs Watson (DW) | Nicola Woolf (NW) |
| John Hunter (JH) | Marilyn Smith (MS) | Jennifer Grotier (JGr) |
| Claire Styles (CS) | Harriet Phelps-Knights (HP-K) | Robin Taverner (RT) |
| Nigel Hill (NH) | Pam Langmead (PL) | Lyn Wright (LW) |
| Rod Lane (RL) | Richard Potter (RP) | Sue Bardetti (SB) |
| Ruth Sturdy (RS) | Jo Santinelli (JS) |  |
|  |  |  |
| **LA Officers** |  |  |
| Yannick Stupples-Whyley (YSW) | Andrew Page (AP) | Clare Kershaw (CK) |
| Val Cleare (VC) - Minutes | Ralph Holloway (RH) | Cllr Tony Ball (TB) |
|  |  |  |

|  |  |
| --- | --- |
| **1** | **Apologies for Absence and substitute notices**Apologies had been received from Philomena Cozens, Ruth Sturdy, Luke Bulpett, Jinnie Nichols, James Saunders, Stuart Roberts and Chanel Lassman.Sarah Speller is no longer a member of Schools Forum and is replaced by Dan Leonard the headteacher at West Hatch High School.Jennifer Grotier substituted for Ruth Sturdy, Pam Langmead for Jinnie Nichols and Carole Herman for James Saunders. |
| **2** | **High Needs Funding 2024/25 (Ralph Holloway / Yannick Stupples-Whyley)**RH and YSW updated Schools Forum on the provisional funding settlement for the High Needs Block for 2024/25 and the implications on the proposals discussed at July’s Forum meeting. Table 2 showed the core School budget since 2021/22. It can be seen that the increase for 2024/25 is significantly lower than previous years and does not follow the announcement in the Autumn Statement in 2022. ‘*The core schools budget in England will receive* ***£2.3 billion*** *of additional funding in each of 2023-24 and 2024-25’*. The **£1.8 billion** increase is the **£1.5 billion** announced in the 2021 Spending Review plus an additional **£300 million**. It was noted this table shows only additional **£2.4 billion** in 2023/24.The provisional settlement at a national level announced the High Needs Block increased by **£440 million** to **£10.5 billion**. Every Local Authority will receive at least a 3% increase per head of their 2-18 population. The maximum increase is 5% and any authority due to gain more than 5% will be capped. Table 3 showed Essex’s provision allocation for 2024/25. Provisional Schools Block for 2024/25 is **£238.5 million**, a provisional increase of £11.7 million and a percentage increase of 5.2%. The High Needs NFF allocated Essex **£239.3 million** but due to capping there is a £773,000 reduction. RP asked for an explanation of capping.CK informed it is a change to how funding has been on previous years. CK did not believe we were notified of this change until the allocation came through. YSW explained about the safety valve programme.Table 4 showed proposals brought back at the July 2023 meeting. Spend is now forecast showing as 7% from 2024/25. If funding is going ahead, it will be 5.2% per annum. Table 5 showed the budgets where the trend in expenditure has significantly increased since 2020/21. Table 6 showed the forecast growth in independent school placements from 2023/24. 38 week day placements are forecast to increase 40.9% from 2023/24 to 2028/29, 38 week residential are forecast. Factors are special school capacity is very limited. There are 4 new schools to be built. One is complete and full. Two are in temporary accommodation. The fourth one has not yet been started. It was noted the investment and business case was done in 2015.RT asked about the issue with independent schools.CK informed we are going to look at the commissioning.RH confirmed the intention is to establish a Sub-Group to look at independent school placements. We hold costs as tight as we can. The Review Group will be a task and finish group.SEN Therapies are also increasing due to the sheer number of young people in the system and work on the contracts will be shared. Special School Top-Up funding increased to **£20.5 million**, whilst places have increased from 3,164 in 2020/21 to 3,697 in 2024/25 (16.8%) as shown in Chart 2. RH indicated we will continue to invest in outreach in 2023/24. If going to have an impact on the Forum’s growth work, need to see whether investments can reduce costs. In 2024/25 there is early intervention for one year only and to measure the impact.JB queried 5% top-up for PRU’s previously.RH indicated this depended on the balances.SB spoke about balances and informed Trusts are hiding costs. As a result of this SB was worried about mainstream schools. YSW confirmed there is a policy applied in calculating who gets what.RH asked why balances had shifted.YSW stated it is due to pooling funding.HPK talked about the Local Authority has a statutory responsibility to academies for SEND. CK responded in terms of SEND, it is around the EHCP’s. RH said the issue is if we took the decision not to fund an academy, there could be a legal challenge by parents in that we are withholding money. They would have EHCP funding. RH stated this is a one-off this year.JB felt that money needs to go to those children due to school holding a balance. There are genuine reasons for holding balances. CK felt we should be mindful; we have introduced as a Forum the ability to direct some of the money where it is needed subject to the level of balances. We are now looking to add this in this paper as a one-off increase. We have changed it now to include banding prioritisation agreed as a Forum in the HNB we receive for next year. With regards to the pooling, we need a financial position on this, but we are depending on the decision to give it Schools Forum agree it in principle. SB highlighted another concern where headteachers did not think they had any money in their pot funding for special needs and did not know how Trusts work.RP commented we need to understand not all Trusts work the same. When considering the mechanism, we need to look at those Trusts who do operate in Essex, and do have localised budgets, whether they are aware of funding and in particular funding from Essex. JF reminded as a general point with regards to financial planned expenditure, nothing is planned beyond the year we are in. The situation has changed, and you need to do something different. Should be doing long-term planning like that which is done with the Local Authority. There are easier mechanisms, and the FRG will have a view when looked at balances held centrally. There is a need to let RH get to the end of the paper to get the full picture of where we are going. JG suggested to check case funding. Is there an agreement? In July it was presented anyone with less than 8% would have no pounds. It is still the same.With regards to 5.6 RH stated for 2024/25 the Authority needs to operate within the funding available. It is therefore proposed to invest only in early intervention in 2024/25 to help make the High Needs Block sustainable in future years. * Outreach £2 million
* Inclusion Fund £1 million
* Training £500,000
* Education Access Turnaround £500,000

5.8 – An information paper will be brought to the High Needs Review Group and Schools Forum a little later in the term setting out more detail on what the Outreach funding will do and how we will measure the impact.Table 10 showed revised proposals of the financial impact which will still result in a deficit in 2026/27 but reduces the cumulative forecast deficit to **£52.9 million**. CK felt it is necessary to monitor investment very carefully and note where it is making a difference. CK informed with regards to the inclusion framework that the Mid quadrant is now seeing is a reduction in EHCPNAs being rejected by the Mid Quadrant team . If the funding is not making a difference, we need to think about whether we pool this and think about our strategy. We need to undertake a review on independent placements and understand what is going on there, We can only forecast on what we know.1. CH commented whilst there is still investment into outreach and demands in mainstream, the concern is not going to be able to demonstrate significant impact for a little while. There is concern in decision making in a year to two years’ time to pull the funding. This has to be a long-term strategy with early intervention. We are not going to be able to make a decision about this any time soon but hang on to early intervention and prevention has to be better.
2. CH believed what none of us would want to see to move money from the Schools Block to the HNB. If we head towards a deficit will there be a wish to move from the Schools Block to the HNB.

With regards to the second point, CK informed these are difficult decisions not just for the Local Authority but also the Essex Education System as a whole. .CH asked can anything further be done to ensure timeline is shorter to get the 4 promised schools.CK responded it is also about the needs of schools where there are growth needs, but we cannot ignore during the period of the capital programme. £85 million has gone into the Essex special schools system but the volume we have experienced during that time has also exacerbated this.RH informed there were 50% more children in special schools in Essex and maintained schools in 2015. The point about the Block transfer – RH gets on a daily basis schools challenging us as the Local Authority sets the banding, £28,000 and £6,000 for every SEND child.JB added a word of caution with regards to investment in outreach. Success is not only financial savings, but when we ran the model before looking at rates of exclusion and retention in those schools. CK responded to CH that we need to look at the success of investment and the impact it is making. JB stated it is a 2-3 year period to establish way of working and impact from that will take time. PL asked with regards to the 4 schools, where are we in the progress?* Chatham school is open and full, and is saving money on a daily basis.
* Hawthorns school is scheduled to open at the latest January 2025.
* Greenwell school to open January 2025.
* Sir Geoff Hirst school possibly to open in September 2025 but potentially earlier than that. We are putting pressure on them.

AP responded we are at a knife edge on the HNB which is worrying. It is important we make the use of this and apply one rule, and look at this in the FRG. Politically, Essex is aware we are in a good position at the moment. This investment has to count significantly, and this will be reported back. We are aware this takes time to implement. Going back to RT’s point about independent schools, this is being raised nationally. There has been discussion recently trying to create co-operatives and bring back to the Local Authorities. PL asked about communicating it to schools to make it clear because schools on the whole do not understand why decisions are made on the HNB. RH informed we are doing substantial SEND funding for schools.SM observed looking at the forecast in Table 10, 7% increase is with the additional schools.RH confirmed we did an exercise and some of this will be factored in our planning. It is profiled in.SM believed it is important what falls within Local Authority balances. A maintained school which SM is familiar with, the balances including school fund and that is not right. The figures reported just over 5% whereas the school funds do not. All the other comments about what Trusts are up to but there are other issues as well and these can be discussed outside of the meeting in the FRG.HPK spoke about balances and one for payment going into schools, do we need to do that payment? Can that money not come into the framework and schools applying and bidding if they need it?JG responded special schools, 34% need it.**Recommendations**Forum agreed the recommendation of the High Needs Review Group to approve the revisions to the funding decisions taken in July to **£4.8 million** for 2023/24 detailed at 5.5 and **£4 million** for 2024/25 detailed at 5.6.**Voting**: unanimously agreed.CK added, we will take the schools out with pulled balances and will have independent looking at those. That has changed slightly, will apply prioritisation of the balances to schools.Forum endorsed the recommendation of the Authority for the creation of an Independent Schools working group.**Voting**: unanimously agreed |
| **3.** | **School Funding 2024/25 (Yannick Stupples-Whyley)**YSW updated Schools Forum on the provisional School Funding Settlement for 2024/25.It was noted under 4.2 that the **£1.8 billion** increase is the **£1.5 billion** announced in the 2021 Spending Review plus an additional **£300 million**. Table 4 showed how moved mainstream grant into the Schools Block.4.5 showed schools will receive additional funding for the agreed teachers’ pay rise through the Teachers’ Pay Additional Grant which is estimated at **£19.1 million**.DW commented that Early Years is not included in this. It was noted there will be an additional grant for Early Years in the Autumn. It is planned to be allocated to the Local Authority by a separate grant rather than a supplementary funding. Need to keep an eye on this for maintained nurseries.JB stated we would ordinarily have received that increase in AWPU in any funding through the schools and paid us directly. Will 2.83% be applied to PRU funding because we no longer benefit from the schools?YSW was not aware of this.**Action**: YSW to look into this.Table 6 showed the DfE’s funding in terms of each factors going into the NFF. The High Needs NFF allocates Essex **£239.3 million** but due to capping there is a **£773,000** reduction.It was noted under 4.10 at a national level funding for the ongoing responsibilities element of CSSB funding increases from **£294 million** in 2023/24 to **£304 million** in 2025/26. 4.11 Historic commitments continue to reduce by 20%. Essex will request that the historic commitments allocation is protected at **£3.8 million** for the final time for 2024/25.Table 6 showed Essex’s provisional allocation.With regards to 4.13 the Early Years Block settlement will not be announced until December. There will be an additional **£288 million** increase for existing provision plus additional funding for the increased 2-year old offer from April 2024 and the new offer from 9 months old from September 2024.Changes for 2024/25:The introduction of a methodology for calculating and allocating funding for falling rolls. Growth fund will look at each area from 2-7 schools. Positive growth is looked at. 5.3 stated Local Authorities must move their local formula factor values at least a further 10% closer to NFF, except where local formulae are already mirroring the NFF. For example, if difference of **£500** in your cap in 2023/24, you need to move to the minimum of **£490** cap.It was noted under 5.5 Local Authorities can only provide Falling Rolls Funding to schools where the school capacity survey (SCAP) 2022 data shows that school places will be required in the subsequent 2-3 years. The requirements that schools must be judged ‘good’ or ‘outstanding’ by Ofsted is removed.The Minimum Funding Guarantee (MFG) must be set between 0.0% and 0.5% per pupil.Also noted under 5.7 Local Authorities that used the London weighting multiplier of 1.0156, which includes Essex, must move 10% closer to the ratio of the London fringe and non-London fringe zones, which for Essex is 1.0345.It was noted a Local Authority is classified as mirroring NFF if their local factor values are within 2.5% of the respective NFF value. Essex mirrors NFF in all factors other than Basic Entitlement. This is due to Essex having a higher primary/secondar funding differential and a higher KS3/KS4 weighting than NFF. As the provisional settlement is less of an increase compared to previous years the Authority does not propose any changes to either the funding differential or the KS3 and KS4 weightings.Proposed changes to the Essex Funding Formula for 2024/25 were discussed. We are proposing to do this in two stages, i.e., halfway position in 2024/25 and as long as funding is allowed to be higher using the multiplier in 2025/26, to ensure uplifted based on geographical cost pressures. It is proposed to increase the London Fringe allowance from 1.0156 to 1.0251 which is halfway between 1.0156 and 1.0345.Table 7 showed the rates that will be funded in 2024/25 (highlighted in yellow) along with the minimum and maximum allowed funding rates for primary schools based on the proposed changes in 7.1 and 7.2. The Basic Entitlement figure is provisional and will be based on the October 2023 Census.Table 8 showed the rates that will be funded in 2024/25 (highlighted in yellow) along with the minimum and maximum allowed funding rates for secondary schools based on the proposed changes in 7.1 and 7.2. The Basic Entitlement figure is provisional and will be based on the October 2023.Annex A showed the provisional financial impact on schools of the proposed changes. It was noted one school has an increase in 2023/24 because it is receiving an enhanced lump sum.Under 7.6 the FRG has considered the proposals put forward by the Local Authority and reviewed the consultation document and recommends that Schools Forum approves the proposed changes and the consultation document. **Questions**JF commented, FRG is mindful if inflation is 6.7% this year, we are concerned that the level of funding will not match costs but will put more pressure on schools which is an issue you need to be aware of as an added pressure and increased difficulties for the High Needs area.SM responded that teachers’ pay under 4.5 equates to an additional 1.65%. Can schools expect 1.65% when that goes through?PL stated the expectation from the DfE is that schools estimated 3%, but lots of schools are looking at a calculation which is no way near covering the allocation. YSW informed the DfE do not have Teachers’ Pay details.PL asked is that likely to change in pupils’ favour. Are schools not going to see additional 3% taking them up to 6.5%?YSW informed they have committed to this but nothing is final until payment is made.**Recommendations** Forum noted the provisional funding settlement for 2024/25.Forum accepted the recommendation of the Finance Review Group (FRG) to approve the recommended changes (at 7.1 and 7.2), andForum accepted the recommendation of the FRG to approve the school funding consultation document (at Annex B). |
| **4.** | **De-delegation & Education Functions 2024/25 (Yannick Stupples-Whyley)**YSW presented to Schools Forum the Authority’s proposal for de-delegation and education functions for 2024/25.Table 2 showed the Authority’s proposals for de-delegation for maintained primary schools for 2024/25 for Public Duties and showed the comparison with previous years.Table 3 showed the Authority’s proposals for de-delegation for maintained secondary schools for Public Duties for 2024/25 and showed the comparison with previous years. With regards to Premature Retirement Costs, in October 2021 Schools Forum had approved to top-slice funding from the Schools Block, High Needs Block and Early Years Block to fund **£1,271,793** for premature retirement costs relating to former school employees.Table 4 showed the funding top-sliced in 2023/24 and the request for 2024/25. The request for 2024/25 remains at **£1,270,142** as to date there is no forecast underspend in 2023/24. Should an underspend materialise before the end of the Autumn Term the Authority will reduce the top-slice.Central Services – Education FunctionsThe responsibilities of services provided by the Local Authority are split between:* Those that are for all schools, which are funded through the Central Schools Services Block, with the agreement of Schools Forum; and
* Those that relate to maintained schools only, which are charged on a per pupil basis, with agreement of the maintained school members of Schools Forum.

Table 5 showed the Authority’s proposals for 2024/25 of £3.08 million. Table 6 showed how the provisional **£1.15 billion** allocation is distributed based on the proposed changes to school funding for 2024/25.**Questions**RT asked about Central Services and the impact on maintained schools. Is it the case that if the number of maintained schools are reducing and those that remain are having to pay a great burden or is there protection?YSW informed of one issue to reduce costs as schools are converting. It takes a while for the costs to reduce. It maybe minimum change at Local Authority level. For any school that converts in the year, we transfer the money to the academy, subject to recoupment as the year progresses.JF indicated, yes it does increase costs, but we need to thank CK’s team to maintain costs at any given time at the moment because there are cost pressures placed upon them. CK confirmed we are holding the costs but there has been a reduction in maintained schools to split the costs between them.JF thanked CK for maintaining the overall costs when pressures and costs are going up.**Recommendations**:Primary maintained members agreed the recommendation of the Finance Review Group (FRG) to approve the proposal for de-delegation for public duties at 4.4;The secondary maintained members agreed the recommendation of FRG to approve the proposal for de-delegation for public duties at 4.5; All School members agreed the recommendation of FRG to top-slice £1.3 million for premature retirement costs at 4.7;All members agreed the recommendations of FRG to approve the proposals for education functions funded by the ongoing responsibilities element of the Central School Services Block at 5.3; andAll maintained members agreed the recommendation of FRG to approve the proposals for education functions to be funded by maintained schools at 5.4. |
| **5.** | **Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies.****ASHE**CH spoke about everybody’s minds have been taken up with the RAAC serious problems. CK had taken up all her time to deal with this right from the announcement on 30/8/23. CK informed there were 11 schools with hybrid learning. There was only one school which did not have a confirmed plan to come on site or to enable the school to reopen. We are involved with meetings with the DfE. As of this week there is one secondary school where plans are being developed to do temporary on site, no confirmed plans, temporary accommodation to come back on site.Headteacher position – the Local Authority has done its best to support. For those colleagues new to headteachers that has been hard, and we have tried to support as best we can.The other issue we have been talking about the high level of young SEN and behaviour challenges and attendance. There remain huge areas, but challenges are which we flagged last time continued at the beginning of this year. There are also mental health issues and challenges across secondary schools. **EPHA**HPK noted RAAC has been the big think for primary schools as well. HPK appreciated the support that CK and team provided in supporting primary schools. As has been highlighted everyone is to look at repairs, buildings and maintenance and this has caused a level of anxiety. Teachers’ pay increase has been welcomed but not money to cover in schools and concerns. Support staff pay is additional pressure, particularly in line with SEN increases in primary schools and finding the right people to work with them and retaining staff when they can earn more outside of school.**ESSET**JG spoke about support staff pay. Obviously, they have had a pay award from 1/4/23, but do not know if there is anything anyone can be doing. We are having a huge issue with retention. Our staff need money now not when it is back pay. Building bulletin: we have 86 children, 183% are physically in school which is causing overcrowding and we can evidence those classrooms. Panel took place last week and identified where can put outreach in. **PRUs**JB talked about recruitment and funding issues. No PRU funding reflected in all the other changes in funding increases. There are two new builds in the South and the second build should be in by November. It does not increase capacity. We are almost full, which is a continuing pattern. Keen to get started with outreach.**Early Years – Nurseries**DW reported the same as everyone else from Hub and SEND funding and children with additional needs. We mentioned nurseries and that has impacted greatly on recruitment and retention. The needs of children have a significant impact on the workforce. Special schools needing funding. There are 14 children on EHCP and not one got placed in a special school and there is one waiting to see if they have got a place. When applied in the Autumn Term the Inclusion Manager challenged this and we are waiting for the outcome assessments at the end of the Summer Term. We were informed we need to put in the assessments earlier. Children are just 3 years of age. Whilst you need that funding, children need places.We looked at how can improve for our schools, children and families and put support in as much as we can. We are at 30% children who are SEN versus mainstream. Transition into nursery and into schools at every step.We looked at the Local Authority with inclusion partners to get bigger impact. Recruitment and retention impacts on challenges and staff. Lost quite a lot of staff last year. There have been a lot of cases of behaviour challenges.**ESGA**RL echoed what was said about RAAC earlier. RL stated schools are supposed to have a consultant elected by the DfE to schools and in a number of places the consultants have not yet been appointed.CK believed this was not right. The DfE Project Director and Case Worker were assigned to every school affected by RAAC. We have direct contact on the Essex situation and the DfE have responded.RL echoed about what had already been said about salaries.**Unions**JF spoke about funding concern as teachers are concerned long-term on impact of funding. Below inflation – but there is just less money in the system which is a pressure. Impact on work with unions and dealing with situations not normally dealing with where people are under stress etc.JF felt there was a huge concern about longer-term thinking in planning education because we do not see very much. It is very much a short-term solution to anything. The impact on mental health to nurses attending was £300,000 last year and that is not enough. Take into account the number of services for mental health there are none unless you are suicidal, and that is not what most children are in. The Government has not got a handle on what it is trying to govern. **Unison** MS echoed what had been said. Concerns about the 2024/25 provisional funding. MS hoped inflation goes down. Concerns about impact of RAAC and where standing on further funding and how the Government is going to fund what needs doing. Huge impact on education, impact on pupils and staff. Support staff pay awards – still need negotiation. MS believed the other two unions GMB and United are going back to members to find out where they stand on proposals put forward.**Church Rep** JS stated her role is to bring all concerns and feedback to Robert Simpson, Director for Diocesan Education, Brentwood. **High Needs Review Sub-Group** Meeting was held on 13th September 2023.RL enquired; do we have a Terms of Reference (ToR)? Yes, these were approved.**Finance Review Group** Meeting was held on 13th September 2023. Forum should note Terms of Reference for both HNRG and FRG.**Early Years Sub-Group** – No minutes available in time for this meeting of 21 September 2023**Any Other Business**None. |
| **6.** | **Minutes of 12th July 2023 (Ruth Bird)**The minutes were accepted as a true record of the discussions held. |
| **7.** | **Minutes Action Log (Yannick Stupples-Whyley)**Early Years – Proposals for allocating the surplus balance.Authority has received financial update for 2022/23 and going through this and an update will be brought to the November Forum.Early Years – Cost Benefit Analysis of Underspend proposals.This is ongoing and will be brought to a future meeting.High Needs Block Surplus – Inclusion Framework – Completed.Early Years – Increase in Funding Rates agreed on 21 July 2023 – Completed. |
| **8.** | **Schools Budget & Education Functions Draft Outturn Report 2023/24****(Yannick Stupples-Whyley)**YSW updated the Forum on the forecast outturn position for 2023/24 which.was set out in Annex A. Table 2 showed the DSG forecast underspend of **£10.5 million** for 2023/24 and a closing balance of £34.8 million. The Schools Block is **£1.2 million** underspend. The Forum was aware the Authority is holding a contingency within the Growth Fund for a future year where the allocation from the DfE is insufficient to meet the growth fund requirement. The contingency was set. at **£800,000** and will be held to minimise top-slicing school budgets for an insufficient growth fund allocation. The remaining **£329,000** is due to an increase in the growth fund for summer term payments to academies and a forecast underspend on furniture and equipment for new and expanding schools **£23,000**. There is an underspend in the High Needs Block of **£5.7 million**. SEN services are forecasting an underspend of **£12.2 million**. The main causeof the underspend is the HNB contingency of **£11.3 million** which hasarisen due to funding increasing faster than expected demand. Thecontingency is held partly to offset in-year pressures and proposals have been presented in Agenda item 3 to utilise the contingency. The Authorityhas decided not to contribute to the pension deficit in 2023/24 resulting in a**£753,000** underspend. The remaining **£118,000** underspend is due tovacant posts.Other alternative provision services are forecasting a **£1.9 million** overspend due to an increase in pupils being placed through the IPES contract.Support for inclusion is forecasting a **£707,000** underspend due tovacancies in the quadrant SEND teams, particularly new posts that have yet to be recruited to.Therapies and other health related services are forecasting a **£437,000** overspend due to an increased use of independent therapists whilst new contracts have been developed.Early Years Block has an underspend of **£3.8 million**. An update will be reported on at the next Forum.Education FunctionsTable 3 showed the approved proposals of **£3.08 million** for services provided to all schools.Table 4 showed that maintained members of Schools Forum agreed to de-delegate from maintained school £48.10 per pupil to fund the education functions. The budgets in Table 4 are subject to recoupment each time aschool converts to an academy. Whilst six primary schools converted toacademy status on 1st September 2023, this report is for August 2023 andtherefore, the conversions are not reflected in this budget update.Table 5 showed all the education functions with an outturn position for2023/24 which forecasts a £12,000 overspend.**Questions**JF observed there was mention of six schools, do you have any indication offinancial risk?YSW will let JF have the figure.**Recommendation**Forum noted the forecast outturn position for 2023/24. |
| **9.** | **Forward Plan**YSW read this out and confirmed the dates of future meetings.With regards to the May 2024 meeting, it is now proposed to be 22nd May 2024. We are waiting to hear if this venue can host the meeting or not.**Recommendation**The Forum noted the dates of future meetings and that additional items as proposed by Schools Forum are included in the Forward Plan.It was noted that additional items as proposed by Schools Forum are included in the Forward Plan. |
|  | **Any Other Business**PL asked with regards to the working group for Independent School Placements whether now was the time to form that.CK informed we want this to be an agile group with representatives from this group and different representations in the sector.HPK offered to be a primary school representative.JG offered to be special needs representative.JH offered to be academy primary representative.JB offered to be PRU representative. |
| **10.** | **Chair’s Closing Comments (Ruth Bird)**RB closed the meeting by saying thank you to all for attending. We have had a good lively meeting and look forward to talking to you again in the November meeting remotely. |
|  | **Date of next meeting – Remote, via Microsoft Teams.****Wednesday, 29th November 2023** |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 10** |
| Date: 29 November 2023 |  |

**REPORT TITLE: Minute Action Log**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330 138464); e-mail: yannick.stupples-whyley@essex.gov.uk

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date of Meeting | Report | Action Owner | Action | Response | Status |
| 18 May 2022 | Agenda Item 9 – Early Years Update | Carolyn Terry | To bring proposals for allocating the surplus balance to the July / September meeting. | The Authority is reviewing the final adjustment for 2022/23 and will update Forum at the January meeting. | In progress |
| 17 May 2023 | Agenda Item 2 – Early Years | Carolyn Terry | Cost Benefit Analysis of Underspend proposals | To be brought to a future meeting. | In progress |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 11** |
| Date: 29 November 2023 |  |

**REPORT TITLE: Forward Plan**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330 138464); e-mail: yannick.stupples-whyley@essex.gov.uk

**1. Purpose of report**

1.1 To bring the Schools Forum Forward Plan and confirm the dates of future meetings.

**2. Recommendations**

2.1That the Forum notes the dates of future meetings.

2.2 That additional items as proposed by Schools Forum are included in the Forward Plan

###### 3. Background

3.1Following a review of School Forum Agendas a Forward Plan has been created. The items included are as follows:

|  |
| --- |
| **Regular and Administrative items** |
| Apologies  |
| Any other business and feedback from schools through Associations |
| Feedback from Schools Forum representatives on other bodies |
| Minutes from previous meetings |
| Forward Plan and dates of next meetings  |
| Sub Group updates (HNRG, Early Years, FRG) |

|  |  |
| --- | --- |
| **Date of Schools Forum** | **Agenda Items** |
| Wednesday 10th January 2024 | DSG Budget 2024/25 (D) |
| (Microsoft Teams) | Third Quarter Budget Update 2023/24 (I) |
|  | High Needs Funding Review (D/I) |
|  | School Balances Review (D/I) |
|  | Independent Schools Review (I) |
|  |  |
| Wednesday 22nd May 2024 | Falling Rolls Fund (D/I) |
| (In-Person – Hamptons Sports and Leisure, Chelmsford) | Schools Budget & Education Functions Draft Outturn Report 2022/23 (I) |
|  | Constitution and Membership of Schools Forum (D /I) |
|  | Early Years and Childcare Update (I) |
|  |  |
| Wednesday 10th July 2024 | Falling Rolls Fund Monitoring (I) |
| (Microsoft Teams) | Schools Budget and Education Functions Q1 Update 2024/25 (I) |
|  | School and Academy Balances (I) |
|  |  |
| Wednesday 25th September 2024 | Half Year Budget & Education Functions Update 2024/25 (I) |
| (In-Person – Hamptons Sports and Leisure, Chelmsford) | Scheme for Financing Schools (D) |
|  | High Needs Funding 2025/26 (D/I) |
|  | School Funding 2025/26 including school funding consultation (D) |
|  | High Needs Funding Review (I) |
|  | De-Delegation 2025/26 (D) |
|  | Falling Rolls Fund |(D) |
|  |  |
| Wednesday 27th November 2024 | Early Years and Childcare Update (I) |
| (Microsoft Teams) | School Funding Consultation Final Proposal (D) |
|  | Scheme for Financing Schools (D/I) |
|  | Constitution and Membership of Schools Forum (D / I) |
|  | School Balances Review (D/I) |
|  | Schools Budget and Education Functions 2024/25 Update (I) |

1. Assumes the same growth fund allocation as 2023/24 [↑](#footnote-ref-1)
2. Sparsity funding is on a sliding scale. Primary schools with less than 75 pupils and secondary schools with less than 300 pupils will attract the full amount. Funding then decreases as pupil numbers increase up to 150 pupils for primary schools and up to 600 pupils for secondary schools. [↑](#footnote-ref-2)