**Schools Forum Agenda**

Wednesday 18th May 2022, **Microsoft Teams Meeting**

8.20am for an **8.30am start**; comfort break **10am**, finish by **11.15am**.

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

**Decision Papers**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 2 | Top-up Funding for Pupils with EHCPs that are dual registered at PRUs | Julie Keating | All schools | 3 |
| 3 | Notional SEN Fund | Yannick Stupples-Whyley | All schools | 5 |
| 4 | Analysis of School Balances | Yannick Stupples-Whyley | All schools | 11 |

**Forum Business**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 5 | Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies | Chair | All schools | 21 |
| 6 | Minutes of 12th January 2022 | Chair | All schools | 30 |
| 7 | Minutes of 21st April 2022 | Chair | All schools | 44 |
| 8 | Minutes Action Log | Yannick Stupples-Whyley | All schools | 52 |

**Information Papers for Discussion**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 9 | Early Years and Childcare Update | Carolyn Terry | All schools | 53 |
| 10 | Draft Schools Budget and Education Functions 2021/22 Outturn Report | Yannick Stupples-Whyley | All schools | 57 |
| 11 | Completing the Reforms to the NFF – DfE Consultation Response | Yannick Stupples-Whyley | All schools | 63 |
| 12 | Constitution and Membership of Schools Forum | Yannick Stupples-Whyley | All schools | 66 |
| 13 | Forward Plan | Yannick Stupples-Whyley | All schools | 75 |

**Confidential Items**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 14 | Confidential Minutes of 12th January 2022 | Chair | All schools |  |

**Closing Comments**

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| 15 | Closing Comments | Chair |  |  |

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| Schools Forum | **Agenda Item 1** |
| Date: 18 May 2022 |  |

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.

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| Schools Forum | **Agenda Item 2** |
| Date: 18 May 2022 |  |

**REPORT TITLE: Pupil Top-Up Funding for Pupils with EHCPs dual registered at Pupil Referral Units**

Report by Ralph Holloway

Contact details: Telephone (03330 322691); e-mail: ralph.holloway@essex.gov.uk

**1. Purpose of report**

* 1. To seek approval to implement a policy that ceases Pupil Top-Up Funding to schools where a pupil attends a Pupil Referral Unit (including St Aubyns and Poplars Adolescent Units).

**2. Recommendations**

2.1 That from 1st September 2022, the Pupil Top-Up Funding paid to a school for a pupil with an EHCP is ceased, where that pupil is dual registered with a Pupil Referral Unit.

2.2 That schools are sent a communication that explains the funding implications for pupils with EHCPs who are referred to a PRU.

2.3 That a future paper is presented to the High Needs Review Group to show the flow of funding following excluded pupils.

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

3.1 **Table 1** is an extract from the Schools Forum Operational and Good Practice Guide (September 2018), which sets out the role of the Authority, Schools Forum and the Secretary of State in setting the Schools Budget.

|  |  |  |  |
| --- | --- | --- | --- |
| Function | Local authority | Schools forum | DfE role |
| Formula change (including redistributions) | Proposes and decides | Must be consulted | Checks for compliance with regulations |

###### 4. Background

4.1 For the majority of pupils with an EHCP, the Pupil Top-Up funding paid to their school is ceased when they are referred to a PRU. However, there are currently 14 pupils where schools are being paid Pupil Top-Up funding for pupils attending PRUs. This equates to £83,500 in a full year. We want to make it policy that all Pupil Top-Up funding ceases for schools when pupils attend a PRU.

4.2 The definition of Pupil Top-Up funding (as per the High Needs Funding: Operational Guidance is:

*Top-up funding (sometimes referred to as element 3) is the funding required over and above the core funding (sometimes referred to as elements 1 and 2) a school or college receives to enable a pupil or student with high needs to participate in education and learning*

4.3 The current funding being paid to schools is being made in error; the PRU is enabling the pupil to participate in education and learning but the school are being funded for this.

4.4 The PRU receives the majority of its funding from the High Needs Block and the school of these 14 pupils are also receiving funding from the High Needs Block, resulting in double funding for these pupils.

4.5 For each term the pupil attends the PRU, the school funds a fee plus one third of the pupil-led funding for that pupil. The termly fee is currently £1,500-£1,800 (one third of pupil-led funding per pupil, which incorporates deprivation and additional needs funding). This is changing from September 2022, when a new funding model is to be implemented (agreed by Schools Forum in October 2021).

4.6 Schools may argue that they require the Pupil Top-Up funding to pay for the termly PRU fee. However, schools should fund this from their Notional SEN Fund as the first £6,000 of support for pupils with an EHCP is met from this fund.

4.7 Pupils remain on roll with their school whilst attending the PRU so the pupil is counted against the school’s EHCP numbers. This determines whether the school are eligible for any shortfall funding should their Notional SEN Fund be insufficient. So, there will be no detrimental effect to those schools with insufficient values in the Notional SEN Fund.

**5. Financial Implications**

5.1 Funding should follow the pupil so it is appropriate that any funding for an EHCP should cease to be funded to a school if that pupil is transferred to a PRU.

5.2 There should be minimal impact for the schools concerned as the additional provision they have funded for the pupil will cease thus reducing cost.

5.3 There will be a saving to the High Needs Block of £83,500.

**6. Other Resource Implications**

**7. Consultation with stakeholders**

**8. Background / Supporting papers.**

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 3** |
| Date: 18 May 2022 |  |

**REPORT TITLE: NOTIONAL SEN BUDGET**

Report by Yannick Stupples-Whyley

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

**1. Purpose of report**

* 1. To update Schools Forum of the impact on the Notional SEN Budget of moving to the National Funding Formula (NFF).
	2. To update Schools Forum on the benchmarking of Essex’s Notional SEN Budget.

**2. Recommendations**

2.1 To agree with the recommendation of both the High Needs Review Group and Finance Review Group that no changes are required to the formula for calculating the Notional SEN Budget at 4.21.

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

3.1 **Table 1** is an extract from the Schools Forum Operational and Good Practice Guide (September 2018), which sets out the role of the Authority, Schools Forum and the Secretary of State in setting the Schools Budget.

|  |  |  |  |
| --- | --- | --- | --- |
| Function | Local authority | Schools forum | DfE role |
| Formula change (including redistributions) | Proposes and decides | Must be consulted | Checks for compliance with regulations |

###### 4. Background

4.1 Local authorities, through agreement with Schools Forum, are required to specify within their funding formulae what percentage of funding allocated through each formula factor contributes to their notional SEN budget.

4.2 It is called the ‘Notional SEN Budget’ because it is up to schools to decide how they spend their budgets.

4.3 With the transition to the schools national funding formula (NFF), some schools are concerned with the impact this has on their funding.

 **Impact of Moving to NFF**

4.4 **Table 2** shows how the notional SEN budget is calculated for Essex schools.

|  |  |  |
| --- | --- | --- |
| Funding Factor | Primary | Secondary |
| Basic Entitlement | 3% | 2% |
| Deprivation - FSM | 0% | 0% |
| Deprivation – FSM6 | 100% | 100% |
| Deprivation – IDACI | 100% | 100% |
| English as an additional language | 100% | 100% |
| Mobility | 100% | 100% |
| Low Prior Attainment | 100% | 100% |
| Lump Sum | 0% | 0% |
| Sparsity | 0% | 0% |
| Split Sites | 0% | 0% |
| Rates | 0% | 0% |
| PFI | 0% | 0% |
| Exceptional Premises | 0% | 0% |
| Minimum per Pupil Level | 0% | 0% |
| Minimum Funding Guarantee | 0% | 0% |

4.5 With the exception of Deprivation FSM which funds schools to provide free school meals, the total funding each school receives for the additional needs factors forms part of the notional SEN budget together with a proportion of the basic entitlement.

4.6 FRG will be aware that the NFF allocates more funding through additional needs factors compared to the Essex Funding Formula, so as schools have transitioned to NFF the notional SEN budget has increased.

4.7 A number of schools have contacted the Authority concerned that the increase in their notional SEN budget is greater than their overall increase in funding between 2021/22 and 2022/23.

4.8 **Table 3** shows the impact on schools

|  |  |
| --- | --- |
|  | No. of Schools |
| Increase in Notional SEN is less than overall Increase in funding | 203 |
| Increase in Notional SEN is greater than the overall Increase in funding | 327 |
|  | **530** |

4.9 It can be seen that more schools have a higher increase in their notional SEN budget than the overall budget increase. This is resulting in some schools stating that they have no funding to spend on the rest of the school.

4.10 The DfE funds high needs on a place plus approach, which for mainstream schools is split into 3 elements:

* Element 1 – Basic Entitlement per pupil
* Element 2 – Notional SEN budget
* Element 3 – Top-up funding from the High Needs Block

4.11 Elements 1 and 2 equate to the **£10,000** place funding for special schools and PRUs and the DfE set Element 1 as **£4,000** and Element 2 as **£6,000** for mainstream schools. This therefore led to schools being required to fund **£6,000** for each EHCP from the Notional SEN budget.

4.12 Should a school have insufficient funding in its notional SEN budget to fund the **£6,000** contribution to each EHCP, the Authority will provide additional funding. For example, a school with 200 pupils has a Notional SEN budget of **£30,000** but has 8 EHCPs. To ensure the school has sufficient funding the Authority will fund an additional **£18,000**.

4.13 The Authority also provides additional protection to ensure schools have a minimum **£105** per pupil in its notional SEN budget once the contribution to EHCPs has been deducted. This is not a requirement of local authorities. Using the above example there would be nothing left in the Notional SEN budget so the Authority would fund an additional **£21,000** (200 x £105).

 **Benchmarking the Notional SEN Budget**

4.14 Given the concern raised by some schools the Authority decided to benchmark the formula for calculating the notional SEN budget against other local authorities.

4.15 **Table 4** shows for primary schools how Essex compares against other local authorities.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Factor | LAs Using | Essex | Highest | Average | Lowest | Essex Rank |
| Basic Entitlement | 116 | 3% | 33.4% | 3.2% | 0% | 72= |
| FSM | 98 | 0% | 100% | 25.9% | 0% | 99= |
| FSM6 | 119 | 100% | 100% | 34.6% | 0% | 1= |
| IDACI | 109 | 100% | 100% | 33.9% | 0% | 1= |
| EAL | 39 | 100% | 100% | 15.8% | 0% | 1= |
| Mobility | 26 | 100% | 100% | 11.7% | 0% | 1= |
| Low Prior Attainment | 147 | 100% | 100% | 86.9% | 0% | 1= |
| Lump Sum | 32 | 0% | 35% | 1.9% | 0% | 33= |
| Sparsity | 4 | 0% | 8% | 0.2% | 0% | 5= |
| Split Sites | 3 | 0% | 5% | 0.1% | 0% | 4= |
| Rates | 1 | 0% | 5% | 0.03% | 0% | 2= |
| PFI | 1 | 0% | 5% | 0.03% | 0% | 2= |
| Exceptional Premises | 32 | 0% | 35% | 1.9% | 0% | 33= |
| MPPL | 11 | 0% | 100% | 2.8% | 0% | 12= |
| MFG | 9 | 0% | 100% | 1.2% | 0% | 10= |

4.16 In the formula factors that the Authority uses to calculate the notional SEN budget we are below average for the amount of basic entitlement used but above average for all of the additional needs factors with the exception of Deprivation – FSM which is not used. Where Essex is ranked 1=, there are a number of other authorities at the same value.

4.17 **Table 5** shows for secondary schools how Essex compares against other local authorities.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Factor | LAs Using | Essex | Highest | Average | Lowest | Essex Rank |
| Basic Entitlement – KS3 | 112 | 2% | 10% | 2.8% | 0% | 85= |
| Basic Entitlement – KS4 | 112 | 2% | 10% | 2.8% | 0% | 83= |
| FSM | 97 | 0% | 100% | 25.5% | 0% | 98= |
| FSM6 | 118 | 100% | 100% | 33.1% | 0% | 1= |
| IDACI | 109 | 100% | 100% | 33.1% | 0% | 1= |
| EAL | 39 | 100% | 100% | 15.8% | 0% | 1= |
| Mobility | 26 | 100% | 100% | 11.8% | 0% | 1= |
| Low Prior Attainment | 148 | 100% | 100% | 87.6% | 0% | 1= |
| Lump Sum | 29 | 0% | 35% | 1.7% | 0% | 30= |
| Sparsity | 6 | 0% | 8.5% | 0.2% | 0% | 7= |
| Split Sites | 3 | 0% | 5% | 0.1% | 0% | 4= |
| Rates | 1 | 0% | 5% | 0.03% | 0% | 2= |
| PFI | 1 | 0% | 5% | 0.03% | 0% | 2= |
| Exceptional Premises | 0 | 0% | 0% | 0% | 0% | 1= |
| MPPL | 11 | 0% | 100% | 2.8% | 0% | 12= |
| MFG | 9 | 0% | 100% | 1.2% | 0% | 10= |

4.18 Again Essex is ranked as 1= for the additional needs factors that are used but is below average on basic entitlement.

4.19 In terms of Statistical Neighbours, our closest neighbour is Kent. Kent does not use basic entitlement in the calculation of the notional SEN budget. It uses all of the additional needs factors except for Deprivation FSM and Mobility and where used, like Essex, 100% of the funding allocated counts towards the calculation of notional SEN. Kent also uses the lump sum, exceptional premises, MPPL and MFG in calculating the notional SEN budget.

4.20 Essex had a total school budget of **£980.8 million**, of which **£108.9** **million** (11.1%) is the notional SEN budget in 2021/22. The average across 150 local authorities is 11%, so it appears that Essex is in line with other local authorities.

4.21 The notional SEN budget has increased due to the transition to NFF. Overall, the formula used to calculate the notional SEN budget is in line with other local authorities and therefore it is proposed that no changes are made. The paper has been discussed at both the High Needs Review Group and the Finance Review Group and both groups recommend that Forum agree that no changes are made.

**5. Financial Implications**

5.1 There are no financial implications based on the recommendation to make no changes.

**6. Other Resource Implications**

**7. Consultation with stakeholders**

**8. Background / Supporting papers.**

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 4** |
| Date: 18 May 2022 |  |

**REPORT TITLE: SCHOOL BALANCES ANALYSIS**

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 of the review of school balances undertaken by the Finance Review Group (FRG) and to seek Forum’s approval for the next stage of review.

**2. Recommendations**

2.1 To approve FRG undertakes a more detailed review of the schools with balances of 30% or above when compared to the budget allocation.

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

3.1 There are no specific powers or responsibilities in relation to school balances.

###### 4. Background

4.1 School balances for maintained schools for their 2020/21 financial year and academies for their 2019/20 financial year were presented to Schools Forum on 6th October 2021. Forum agreed that further analysis should be undertaken.

4.2 The following detailed analysis was presented to FRG on 22 February 2022:

**DfE Recommended Level of Balances**

4.3 The DfE recommends that schools should hold no more than 8% of their latest school budget allocation, with the exception of secondary schools who should hold no more than 5% of their latest school budget allocation. The DfE regards any balance above these levels as excess balances.

4.4 Academies are advised by their auditors to hold higher balances due to their charitable status, however schools unlike charities have a regular and stable source of funding. Therefore, the DfE balance recommendations in 4.3 are appropriate for academies.

4.5 Table 1 shows the top 10 primary schools with the highest balances as a percentage of budget share. These are significantly higher than the recommended 8%.

|  |  |  |  |
| --- | --- | --- | --- |
| School | Balance£ | Budget£ | Balance as %% of Budget |
| St Thomas More’s RC Primary, Colchester | 538,596 | 824,124 | 65.4% |
| Powers Hall Academy | 699,115 | 1,131,636 | 61.8% |
| Pemberley Academy | 409,000 | 734,088 | 55.7% |
| Rolph CE Primary School | 433,252 | 792,282 | 54.7% |
| Noak Bridge Primary | 448,500 | 821,420 | 54.6% |
| South Benfleet Primary | 763,808 | 1,440,306 | 53.0% |
| St Andrew’s CE Primary, Gt Yeldham | 299,197 | 580,143 | 51.6% |
| Cann Hall Primary School | 850,821 | 1,671,871 | 50.9% |
| Crays Hill Primary School | 251,807 | 555,836 | 45.3% |
| Perryfields Junior School | 478,708 | 1,059,344 | 45.2% |

4.6 Table 2 shows a breakdown of all primary schools, banding the percentage of balance held in intervals of 10%. It can be seen that only 107 schools have a balance between 0% and 8%.

|  |  |
| --- | --- |
| Balances | No. of Schools |
| 60% and above | 2 |
| Between 50% & 59.9% | 6 |
| Between 40% & 49.9% | 12 |
| Between 30% & 39.9% | 24 |
| Between 20% & 29.9% | 67 |
| Between 8.1% & 19.9% | 193 |
| Between 0% & 8.0% | 107 |
| Deficit | 36 |
| Total Schools | **447** |

4.7 Table 3 shows the top 10 secondary schools with the highest balance as a percentage of budget share.

|  |  |  |  |
| --- | --- | --- | --- |
| School | Balance£ | Budget£ | Balance as %% of Budget |
| The King John School | 6,784,184 | 8,165,462 | 83.1% |
| Colchester Royal Grammar | 2,245,758 | 2,736,980 | 82.1% |
| Clacton Coastal Academy | 3,448,992 | 7,080,913 | 48.7% |
| Manningtree High School | 1,758,759 | 4,057,124 | 43.3% |
| The James Hornsby School | 2,177,043 | 5,057,240 | 43.0% |
| Chelmer Valley High School | 2,060,150 | 4,986,134 | 41.3% |
| Stewards Academy | 2,060,150 | 4,986,134 | 35.5% |
| Chelmsford County High | 1,163,578 | 3,400,307 | 34.2% |
| St Mark’s West Essex | 1,278,342 | 4,288,034 | 29.8% |
| The Gilberd School | 2,069,153 | 7,520,372 | 27.5% |

4.8 Table 4 shows a breakdown of all secondary schools, banding the percentage of balance held in intervals of 10%. It can be seen that only 10 schools have a balance between 0% and 5%.

|  |  |
| --- | --- |
| Balances | No. of Schools |
| 60% and above | 2 |
| Between 50% & 59.9% | 0 |
| Between 40% & 49.9% | 4 |
| Between 30% & 39.9% | 2 |
| Between 20% & 29.9% | 11 |
| Between 10% & 19.9% | 18 |
| Between 5.1% & 9.9% | 21 |
| Between 0% & 5.0% | 10 |
| Deficit | 11 |
| Total Schools | **79** |

4.9 Table 5 shows the top 10 special schools with the highest balance as a percentage of budget share.

|  |  |  |  |
| --- | --- | --- | --- |
| School | Balance£ | Budget£ | Balance as %% of Budget |
| The Pioneer School | 1,788,477 | 2,659,662 | 67.2% |
| Thriftwood School | 1,331,008 | 3,009,929 | 44.2% |
| Columbus School & College | 1,269,109 | 4,332,500 | 29.4% |
| Grove House School | 444,221 | 1,623,519 | 27.4% |
| Lexden Springs School | 1.502,805 | 5,601,498 | 26.8% |
| Market Field School | 1,118,858 | 4,438,390 | 25.2% |
| The Endeavour | 358,225 | 1,613,259 | 22.2% |
| Castledon School | 499,931 | 2,835,065 | 17.6% |
| Glenwood School | 1,044,094 | 6,308,983 | 16.5% |
| Kingswode Hoe School | 251,872 | 1,729,295 | 14.6% |

4.10 Table 6 shows a breakdown of all special schools, banding the percentage of balances held in intervals of 10%. It can be seen that 8 special schools have a balance between 0% and 8%.

|  |  |
| --- | --- |
| Balances | No. of Schools |
| 60% and above | 1 |
| Between 50% & 59.9% | 0 |
| Between 40% & 49.9% | 1 |
| Between 30% & 39.9% | 0 |
| Between 20% & 29.9% | 5 |
| Between 8.1% & 19.9% | 3 |
| Between 0% & 8.0% | 8 |
| Deficit | 1 |
| Total Schools | **19** |

4.11 Table 7 shows the balances held by PRUs. It can be seen all PRUs have balances above 8%.

|  |  |  |  |
| --- | --- | --- | --- |
| School | Balance£ | Budget£ | Balance as %% of Budget |
| Heybridge Co-operative Academy | 2,419,153 | 2,070,052 | 116.9% |
| North East Co-operative Academy | 1,147,679 | 2,414,674 | 47.5% |
| The St Aubyn Centre | 223,772 | 825,943 | 27.1% |
| CSS South | 1,083,454 | 4,710,369 | 23.0% |
| Poplar Adolescent Unit | 71,517 | 433,859 | 16.5% |
| Beckmead Moundwood | 53,375 | 450,000 | 11.9% |

**Correlation of Balances to Deprivation and Rurality**

4.12 The review of school balances looked whether there was any correlation held between school with high balances having low levels of deprivation or schools with low balances having high levels of deprivation.

4.13 No correlation could be found between deprivation and the level of balances held by schools.

4.14 The review also looked at whether there was any evidence of correlation between school balances and rurality. The DfE classify schools into the following categories:

* Rural hamlet and isolated dwellings
* Rural village
* Rural town and fringe
* Urban city and town
* Urban major conurbation

4.15 Table 8 shows how primary schools fit into the above classifications and the balances held.

|  |  |  |
| --- | --- | --- |
| Location Classification | No. of Schools | Balances£ |
| Rural Hamlet & Isolated Dwellings | 21 | 1,959,016 |
| Rural Village | 64 | 6,223,787 |
| Rural Town & Fringe | 73 | 10,987,027 |
| Urban City & Town | 275 | 49,157,019 |
| Urban Major Conurbation | 14 | 2,680,321 |

4.16 There is some correlation between rurality and school balances. Of the 21 schools in rural hamlets and isolated dwellings, 17 are in the lower half of primary school balances and 6 schools are in the fourth quartile.

4.17 Of the 64 schools in rural villages , 15 schools are in the fourth quartile.

4.18 Table 9 shows how secondary schools fit into the location classifications.

|  |  |  |
| --- | --- | --- |
| Location Classification | No. of Schools | Balances£ |
| Rural Hamlet & Isolated Dwellings | 3 | (311,721) |
| Rural Village | 1 | 0 |
| Rural Town & Fringe | 9 | 5,965,117 |
| Urban City & Town | 61 | 37,640,650 |
| Urban Major Conurbation | 5 | 4,146,000 |

4.19 Similar to primary there is some correlation between secondary school balances and rurality. All schools within rural hamlets and rural villages are in the fourth quartile for secondary school balances.

**Highest and Lowest Balances**

4.20 Table 10 shows the highest balances for primary schools

|  |  |  |
| --- | --- | --- |
| School | Pupils | Balance£ |
| Cann Hall Primary School | 445 | 850,821 |
| Lyons Hall School | 537 | 774,084 |
| South Benfleet Primary School | 418 | 763,808 |
| Lee Chapel Primary School | 884 | 749,000 |
| Wickford Primary School | 559 | 705,489 |
| Powers Hall Academy | 293 | 699,115 |
| Millhouse Primary School | 621 | 683,824 |
| Ravens Academy | 393 | 623,955 |
| Alton Park Junior School | 487 | 604,000 |
| Eversley Primary School | 417 | 600,017 |

4.21 Table 11 presents the highest balances for primary schools on a per pupil basis.

|  |  |  |  |
| --- | --- | --- | --- |
| School | Pupils | Balance£ | Balance per Pupil£ |
| Highwood Primary School | 44 | 126,708 | 2,880 |
| Crays Hill Primary School | 89 | 251,807 | 2,829 |
| St Thomas More’s RC Primary | 209 | 538,596 | 2,577 |
| Powers Hall Academy | 293 | 699,115 | 2,386 |
| Pemberley Academy | 173 | 409,000 | 2,364 |
| Hazelmere Junior School | 222 | 506,270 | 2,283 |
| St Andrew’s CE, Gt Yeldham | 138 | 299,197 | 2,168 |
| Noak Bridge Primary School | 212 | 448,500 | 2,116 |
| Rolph CE Primary School | 207 | 433,252 | 2,093 |
| Tolleshunt D’Arcy St Nicholas | 97 | 201,491 | 2,077 |

4.22 Table 12 presents the lowest balances for primary schools.

|  |  |  |
| --- | --- | --- |
| School | Pupils | Balance£ |
| Maldon Primary School | 253 | (176,000) |
| Cherry Tree Academy | 166 | (185,053) |
| Stapleford Abbots Primary School | 135 | (276,000) |
| Plumberow Primary School | 638 | (337,326) |
| Katherines Primary Academy | 258 | (374,038) |
| Little Parndon Primary Academy | 409 | (393,790) |
| Royden Primary Academy | 200 | (419,599) |
| Hockley Primary School | 331 | (448,632) |
| Freshwaters Primary Academy | 401 | (496,013) |
| Westerings Primary Academy | 360 | (614,027) |

4.23 Table 13 presents the lowest balances per pupil for primary schools.

|  |  |  |  |
| --- | --- | --- | --- |
| School | Pupils | Balance£ | Balance per Pupil£ |
| Maldon Primary School | 253 | (176,000) | (696) |
| Oaklands Infant School | 177 | (146,875) | (830) |
| Little Parndon Primary Academy | 409 | (393,790) | (963) |
| Cherry Tree Academy | 166 | (185,053) | (1,115) |
| Freshwaters Primary Academy | 401 | (496,013) | (1,237) |
| Hockley Primary School | 331 | (448,632) | (1,355) |
| Katherines Primary Academy | 258 | (374,038) | (1,450) |
| Westerings Primary Academy | 360 | (614,027) | (1,708) |
| Stapleford Abbotts Primary School | 135 | (276,000) | (2,044) |
| Roydon Primary Academy | 200 | (419,599) | (2,098) |

4.24 Table 14 shows the highest balances for secondary schools

|  |  |  |
| --- | --- | --- |
| School | Pupils | Balance£ |
| The King John School | 1,718 | 6,784,184 |
| Clacton Coastal Academy | 1,120 | 3,448,992 |
| Colchester Royal Grammar School | 575 | 2,245,758 |
| The James Hornsby School | 894 | 2,177,043 |
| The Gilberd School | 1,555 | 2,069,153 |
| Chelmer Valley High School | 1,022 | 2,060,150 |
| Stewards Academy | 1,075 | 1,995,666 |
| Manningtree High School | 835 | 1,758,759 |
| Roding Valley High School | 1,189 | 1,429,000 |
| Plume School | 1,448 | 1,311,567 |

4.25 Table 15 shows the highest balances per pupil for secondary schools

|  |  |  |  |
| --- | --- | --- | --- |
| School | Pupils | Balance£ | Balance per Pupil£ |
| The King John School | 1,718 | 6,784,184 | 3,950 |
| Colchester Royal Grammar | 575 | 2,245,758 | 3,906 |
| Clacton Coastal Academy | 1,120 | 3,448,992 | 3,079 |
| The James Hornsby School | 894 | 2,177,043 | 2,435 |
| Manningtree High School | 835 | 1,758,759 | 2,106 |
| Chelmer Valley High School | 1,022 | 2,060,150 | 2,016 |
| Stewards Academy - Science Specialist, Harlow | 1,075 | 1,995,666 | 1,856 |
| Chelmsford County High School  | 725 | 1,163,578 | 1,605 |
| St Mark's West Essex | 829 | 1,278,342 | 1,542 |
| Sir Frederick Gibberd College | 70 | 104,003 | 1,486 |

4.26 Table 16 shows the lowest balances for secondary schools

|  |  |  |
| --- | --- | --- |
| School | Pupils | Balance£ |
| Forest Hall School | 501 | (118,803) |
| Joyce Frankland Academy, Newport | 793 | (227,918) |
| Epping St Johns CE School | 840 | (245,383) |
| Alec Hunter Academy | 789 | (305,069) |
| Brentwood County High School | 783 | (348,000) |
| Bmat Stem Academy | 48 | (658,951) |
| The Deanes | 483 | (1,051,000) |
| Greensward Academy | 1,201 | (1,070,653) |
| Mark Hall Academy | 750 | (1,824,000) |
| Tendring Technology College | 1,550 | (1,876,974) |

4.27 Table 17 shows the lowest balances per pupil for secondary schools

|  |  |  |  |
| --- | --- | --- | --- |
| School | Pupils | Balance£ | Balance per Pupil£ |
| Forest Hall School | 501 | (118,803) | (237) |
| Joyce Frankland Academy | 793 | (227,918) | (288) |
| Epping St Johns CE School | 840 | (245,383) | (292) |
| Alec Hunter Academy | 789 | (305,069) | (387) |
| Brentwood County High School | 783 | (348,000) | (444) |
| Greensward Academy | 1,201 | (1,070,653) | (891) |
| Tendring Technology College | 1,550 | (1,876,974) | (1,211) |
| The Deanes | 483 | (1,051,000) | (2,176) |
| Mark Hall Academy | 750 | (1,824,000) | (2,434) |
| Bmat Stem Academy | 48 | (658,951) | (13,728) |

4.28 Tables 18 to 21 show the highest and lowest balances for special schools

Table 18

|  |  |  |
| --- | --- | --- |
| School | Pupils | Balance£ |
| The Pioneer School | 148 | 1,788,477 |
| Lexden Springs School | 169 | 1,502,805 |
| Thriftwood School | 228 | 1,331,008 |
| Columbus School and College | 244 | 1,269,109 |
| Market Field School | 329 | 1,118,858 |

Table 19

|  |  |  |  |
| --- | --- | --- | --- |
| School | Pupils | Balance£ | Balance per Pupil£ |
| The Pioneer School | 148 | 1,788,477 | 12,057 |
| Lexden Springs School | 169 | 1,502,805 | 8,892 |
| Thriftwood School | 228 | 1,331,008 | 5,838 |
| Columbus School and College | 244 | 1,269,109 | 5,207 |
| Wells Park School | 49 | 232,120 | 4,737 |

Table 20

|  |  |  |
| --- | --- | --- |
| School | Pupils | Balance£ |
| Wells Park School | 49 | 232,120 |
| Southview School | 77 | 163,416 |
| Harlow Fields School and College | 158 | 115,109 |
| Shorefields School | 139 | 104,503 |
| Oak View School | 125 | (19,704) |

Table 21

|  |  |  |  |
| --- | --- | --- | --- |
| School | Pupils | Balance£ | Balance per Pupil£ |
| Cedar Hall School | 156 | 233,169 | 1,495 |
| The Edith Borthwick School | 235 | 274,528 | 1,168 |
| Shorefields School | 139 | 104,503 | 752 |
| Harlow Fields School | 158 | 115,109 | 729 |
| Oak View School | 125 | (19,704) | (158) |

4.29 Tables 22 and 23 show the position for PRUs

Table 22

|  |  |  |
| --- | --- | --- |
| School | Pupils | Balance£ |
| Heybridge Co-Operative Academy | 135 | 2,419,153 |
| North East Essex Co-operative | 152 | 1,147,679 |
| Children's Support Service Basildon | 198 | 1,083,454 |
| The St Aubyn Centre | 28 | 223,772 |
| Poplar Adolescent Unit | 16 | 71,517 |
| Beckmead Moundwood Academy | 90 | 53,375 |

Table 23

|  |  |  |  |
| --- | --- | --- | --- |
| School | Pupils | Balance£ | Balance per Pupil£ |
| Heybridge Co-Operative | 135 | 2,419,153 | 17,920 |
| The St Aubyn Centre | 28 | 223,772 | 7,992 |
| North East Essex Co-operative  | 152 | 1,147,679 | 7,551 |
| CSS South | 198 | 1,083,454 | 5,472 |
| Poplar Adolescent Unit | 16 | 71,517 | 4,470 |
| Beckmead Moundwood | 90 | 53,375 | 593 |

4.30 The 2 maintained nursery schools both have surplus balances:

* Tanglewood £56,075 or £291 per pupil
* Woodcroft £69,563 or £500 per pupil

4.31 Beaulieu Park has a surplus balance of £580,000 or £2,915 per pupil.

4.32 FRG prefer balances shown on a per pupil basis but however balances are presented the DfE and Treasury will see this



**5. Financial Implications**

5.1 Each time the DfE asks for more money for schools the Treasury will look at school balances and the harder it gets to seek more funding the DfE may wait until balances start to decrease.

**6. Other Resource Implications**

**7. Consultation with stakeholders**

**8. Background / Supporting papers.**

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5** |
| Date: 18 May 2022 |  |

Any Other Business and Feedback from Associations and Other Forum Members

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5a** |
| Date: 18 May 2022 |  |

**High Needs Review Group Minutes - 26th April 2022**

Attendees:

|  |  |  |
| --- | --- | --- |
| Jeff Fair (Chair) (JB) | Rod Lane (RL) | Jo Barak (JB) |
| Ruth Bird (RB) | Sue Bardetti (SB) | John Revill (JR) |
| Simon Wall (SW) | Ruth Sturdy (RS) | Harriet Phelps-Knights (HP-K) |
| John Hunter (JH) | Philomena Cozens (PC) | Emily Welton (EW) |
| Ralph Holloway (RH) | Yannick Stupples-Whyley (YSW) |  |

|  |  |  |
| --- | --- | --- |
|  |  |  |
| 1 | Introductions and Apologies for Absence | JF welcomed everyone to the meeting.Apologies were received from Luke Bulpett, Pam Langmead and Simon Thompson. |
| 2 | Top-Up Funding for Pupils Dual Registered at PRUs | RH introduced the report concerning pupils on roll at a school but attending a PRU due to a positive referral or medical needs. The report seeks to ensure there is no double funding.JB queried the number of pupils quoted in the report and stated from September schools will not need to fund the placement.HP-K agreed on the basis of consistency but raised redundancies could occur if schools are not funded. Should argue that notional SEN funding is not enough.PC stated that the national direction of travel (Green Paper) needs to be considered. White paper wants to discourage pupils with EHCPs ending up in PRUs, unless we can guarantee the placement is short.RH stated that the Green Papers intention around alternative provision are good.JB stated that primary do not need to pay for a positive referral other than AWPU. There are very few PR2s from primary.JF commented that RH had stated they are mainly medical.RH stated if they are coming on a one way ticket the funding to the school must cease.SB commented that if it is the other way round when a pupil comes into school mid-year there is no funding.RH stated that Julie Keating or Michael O’Brien would need to comment on funding. Top-up funding will be given mid-year.SB responded that mid-year you do not get AWPU.RH suggested that Julie Keating brings a paper on pupils moving back into schools.SB reiterated if coming back mid-year no funding other than top-up.JF commented his interpretation of the discussion is that there should be a strategy that is equitable. If no pathway is planned a school should not be funded. If there is a plan for the pupil to return to school there needs to be a 2 term review process.HNRG voted in favour of the recommendations.JF commented that a paper needs to be brought back on the funding arrangements. |
| 3 | Notional SEN Budget | YSW introduced the report, reviewing how Essex’s calculation of the notional SEN budget compares to other local authorities.JF stated he remembered looking at which factors contributed to the notional SEN budget.PC also remembered and stated it makes sense to stay where we are and that she agreed with the recommendation.HNRG agreed to support the recommendation not to make any changes to the calculation of the notional SEN budget. |
| 4 | Any Other Business | None |
| 5 | Closing Comments  | JF thanked everyone for attending and stated the date of next meeting is 21st June 2022. |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5b** |
| Date: 18 May 2022 |  |

**Finance Review Group Minutes - 26th April 2022**

In Attendance

|  |  |  |
| --- | --- | --- |
| Jeff Fair (Chair) (JF) | Rod Lane (RL) | Ruth Bird (RB) |
| John Hunter (JH) | Nigel Hill (NH) | Sue Bardetti (SB) |
| Sean Moriarty (SM) | Pam Langmead (PL) | Harriet Phelps-Knights (HP-K) |
| Yannick Stupples-Whyley (YSW) |  |  |

|  |  |  |
| --- | --- | --- |
| **Item** | **Report** |  |
| 1 | Welcome and Apologies | JF welcomed everyone to the meeting.Apologies were received from Simon Thompson and Richard Green. |
| 2 | Notional SEN Fund | YSW introduced the report, apologising to the members who had already discussed this earlier at the High Needs Review Group. It has come to FRG as it is based on the Schools Funding Formula.JF commented that some of us have been round long enough to remember putting the formula together.FRG supported the recommendation that no changes should be made to the calculation of the notional SEN budget. |
| 3 | Government Response on Completing the Reforms of the NFF | YSW introduced the report which sets out the Government’s response to consultation on completing the reforms of the schools national funding formula (NFF).JF commented there were no surprises in the Government’s response. |
| 4 | School Balances Verbal Update | YSW gave a verbal update on the review of School Balances explaining that Trust central services balances had been added. He explained that consideration needs to be given on how to calculate the balance for Trusts that have more than just Essex schools.PL suggested that the growth in Trust balances reflects an increase in the number of trusts and asked do we know the growth. Suggested that a per pupil calculation will be helpful for Trusts with more than just Essex schools.PL also asked for a range of percentage held for central services across trusts.YSW stated the information will be obtained.JH stated that some auditors require academies hold balances of 30%.JF said we should not expect schools to hold 30%.SM asked were the trust central fund balances on top of what we have already seen.YSW responded yes.SM stated he looks forward to the June paper. |
| 5 | Closing Comments | JF thanked everyone and reminded members that the next meeting is on 21st June at 11am. |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5c** |
| Date: 18 May 2022 |  |

**Early Years Sub Group Minutes – 21st April 2022**

**Attended**

Carolyn Terry, Yannick Stupples-Whyley & Sandie Leader - ECC

Rod Lane –Schools Forum Chair

19 providers – see list at end of minutes

**Apologies**

|  |  |  |  |
| --- | --- | --- | --- |
| Epping | Childminder | Jennie Heath | Jennie Louise Heath  |
| Maldon | Preschool | Rhiannon Dyson & Terri Ewer | Treetops pre-school  |
| Rochford | Childminder | Jo Gridley | Jo Gridley |
| Tendring | Preschool | Mrs Laura Grant | Walton Pre School |

**Review of minutes and action log**

Minutes agreed as accurate, and actions completed except for: Start process to set up some support groups as needed – Long Covid sufferers Support Group in first instance.

**Action:** Group to let ECC know if this is still needed.

**Schools Forum meeting feedback 12th January 2022**

Yannick updated budget position on provisional settlement of dedicated schools grant. Provisional settlement due to EY block goes over 2 financial years. Schools forum agreed rates for 2022-23. EYCC update pressures and issues raised from this group, re SEND and Funding levels.

**Expression of interest for Chair**

Laura has stepped down as chair due to health and well-being. Thanked Laura for her support whilst she has been chairing.

Agreed that Chanel move to Chair and ask for expression of interest for Vice-chair.

**Action:** Set up meeting with Chanel to discuss role of Chair

**Action:** Send out role of Vice-chair and request expression of interest for Vice-chair

**Ofsted inspection outcomes - lack of consideration of the impact that Covid has had on settings, staff & children & EYFS reforms revised EYFS**

Recent Ofsted inspections have not indicated the impact of COVID on settings and children. Change of routines, staff sickness, children’s development due to nonattendance etc. Inspection grades have gone done for settings.

Not sure whether this is due to COVID or the new framework.

Now trying to get back to business as usual: rearrange resources, staff ratios due to ongoing sickness, Settling in new children, training for staff who have been on furlough.

Reports focus on Safeguarding – have providers taken on board changes

Mixed views as to whether providers have had the opportunity to implement the new EYFS due to COVID.

ECC have meetings with Ofsted, can share views. Will be analysing change in inspection grades. New framework training has been offered. Can we do anything else?

Initial training attended, left with questions need support now with putting into practice.

Providers should be doing what they are doing for their families not because Ofsted are due or inspecting.

Ofsted handbook can be accessed to support what Ofsted are inspecting on, but would prefer a more personal approach as to what Ofsted expect for each grade.

Can sign up to Ofsted ‘Big Conversations’ – [#OfstedBigConversation – Join The Conversation (theofstedbigconversation.co.uk)](https://theofstedbigconversation.co.uk/)

Can EYEPs do a pre-Ofsted visit again – ECC reduction in team now, possible peer review approach

SCA do consultancy work for providers and pre-inspection visits

**Action:** Carolyn to take issues and concerns to next Ofsted meeting

**Action:** Carolyn to raise with EYEPs about what is available for support and potential peer reviews

**Increased costs for childcare providers**

We are aware of increased costs to providers and continually raise this with DfE.

Are there any grants available to support providers from underspend of funding? Carolyn said this is being covered later in agenda

Cost of place has gone up and whilst funding has increased the financial gap is still increasing. Discussion around business model re 30-hour places, cost of private places. Could providers all have same delivery of FEEE hours. This would be difficult as providers have different business models in how they operate.

Government Early Years Development plan – Mentor scheme. Can this funding not be used to support FEEE rates? Carolyn feels this is short time funding so would not be able to maintain the rate going forward.

FEEE funding is set. Settings could do a weekly price cost to support with increased costs. Look at potential for natural resources.

ECC have changed from Free to Funded entitlement to support parent with interpretation of the entitlement.

Discussion about deadline date for 30-hour entitlement and parents aware of when they can access the 30 hours – ECC do lobby with DfE about changing criteria and give information by FIS website and Parent handbook. ECC are not able to amend start date for 30 hour, if amended the DfE would not pay the additional hours funding.

**Funding for ASC & HC for children with SEND**

ASC providers can apply for Inclusion Funding for school age children

Link for IF funding on EYCC website: [Inclusion funding (essex.gov.uk)](https://eycp.essex.gov.uk/funding/inclusion-funding/)

Providers can apply for school holidays for children who are accessing PAP during term time.

**Early Years Updates**

* New Early Years and Childcare Strategy – not covered shared with minutes
* Budget update regular slot at these meetings – presentation attached to minutes

Budget is based on participation and children in attendance. Funding levels for each type of funding. Some funding streams are overspent, ECC are not able to change the allocation for each funding level to offset this. Funding is paid using 2 January census, 2021-22 funding was allocated based on 9/12th of Jan 21 census & 3/12th Jan 22.

Why is Census done in January (Spring term). DfE take the average using Spring term as Autumn term lowest attendance, Summer term highest attendance.

Can DAF be opened to FEE2 children if need identified? Other LAs have asked, DfE need to agree, and this is being taken forward for discussion.

LA can retain up to 5% of funding Essex retain 1.8% of funding.

Inclusion Partners are part funded from the Dedicated School Grant – EY funding.

Early Years Block surplus – Can be used for one off costs, cannot use to increase funding rates. Based on adjustment to budget surplus was 3.8M now 2M, this will be adjusted dependant upon outcome of January 22 census.

**Action:** Send out presentations with minutes

**Items to take to the Essex Schools Forum next meeting**

Increased costs to Early Years sector

**AOB**

Membership and vacancies – some members have never attended. Discuss with Chanel vacancies and whether we have appropriate membership.

EYFS newsletter & Conference:

Email: workforcedevelopment@essex.gov.uk to sign up for the newsletter

**New EY Conference  ‘The early years in Essex - a vision for change’**

Saturday 21 May 9:30am – 5pm at a cost of £35 per person.

For more information and to book your place, please visit [Education Essex online booking system](https://eur02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fnews.news.essex.gov.uk%2FEE451DCC74A58AB3D4A2A133ED524F8C6451509E97F8D1209EE76C2FEA053C23%2F4D87F548F0A20B86FCCB01F3DCF3316A%2FLE35&data=04%7C01%7C%7C58130d833afa4013ae2c08da21d778d1%7Ca8b4324f155c4215a0f17ed8cc9a992f%7C0%7C0%7C637859506614052661%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000&sdata=P%2FgMoq7Gl43hMOzEFno0j5szUmE0xvB856vz9nqVvuI%3D&reserved=0).

**Action:** Email members to see if still want to be on Sub-group

**Date of next meeting – Thursday 16th June 2022 via TEAMS 7.00-8.30pm**

**Future dates –8th September 22, 3rd November 22 & 8th December 22**

**Action Log**

|  |  |  |  |
| --- | --- | --- | --- |
| Action | Action for | Date to be completed | Action completed |
| Long Covid sufferers Support Group – Email if feel still needed | Members | By 6th May |  |
| Set up meeting with Chanel to discuss role of Chair | Carolyn | Before next meeting 16th June |  |
| Send out role of Vice-chair and request expression of interest for Vice-chair with minutes | Sandie | By 29th May |  |
| Take issues and concerns to next Ofsted meeting | Carolyn | Meeting on 25th May  |  |
| Raise with EYEPs about what is available for support and potential peer reviews | Carolyn | By 16th June |  |
| Send out EYCC Strategy & Budget updates with minutes | Sandie | By 29th May |  |
| Email members to see if still want to be on Sub-group | Sandie | By 6th June  |  |

**Attendees**



|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 6** |
| Date: 18 May 2022 |  |

Minutes of 12th January 2022

**Schools Forum Meeting Minutes of Wednesday 12th January 2022**

**Via Microsoft Teams**

**08.30am – 11.06am**

*(subject to forum approval)*

In Attendance

|  |  |  |
| --- | --- | --- |
| Rod Lane (RL) – Chair | Jo Barak (JB) | Simon Wall (SW) |
| Jeff Fair (JF)  | Ruth Bird (RB) | Luke Bulpett (LB) |
| Pam Langmead (PM) | Simon Thompson (STh) | Carole Herman (CH) |
| Richard Green (RG) | Harriet Phelps-Knights (HP-K) | Ruth Sturdy (RS) |
| Philomena Cozens (PC) | Nigel Hill (NH) | Emily Welton (EW) |
| Lyn Wright (LW) | Claire Styles (CS) | Sue Bardetti (SB) |
| Sean Moriarty (SM) | Marilyn Smith (MS) |  |
| Paul Banks (PB) | Jinnie Nichols (JN) |  |
| Debs Watson (DW) | Mark Farmer (MF) |  |
|  |  |  |
| **LA Officers** |  |  |
| Yannick Stupples-Whyley (YSW) | Cllr Tony Ball (TB) | Ralph Holloway (RH) |
| Andrew Page (AP) | Helen Lincoln (HL) | Carolyn Terry (CT) |
| Val Cleare (VC) - Minutes |  |  |

|  |  |
| --- | --- |
| **1** | **Apologies for Absence and substitute notices**Rod Lane welcomed everyone to the Teams meeting. Apologies have been received from Clare Kershaw, Paul Banks, Emma Wigmore, Jinnie Nicholls, John Hunter, Laura Grant, John Revill, Jo Santinelli,Simon Thompson will substitute for Paul Banks. Pam Langmead will substitute for Jinnie Nicholls. |

|  |  |
| --- | --- |
| **2** | **De-Delegation – School Improvement (Yannick Stupples-Whyley)**YSW sought the approval of primary and secondary maintained members to support Authority’s proposal to de-delegate funding for School Improvement following the DfE consultation to cease funding the School Improvement Monitoring and Brokering Grant.On 11/1/22 a response was received from the DfE. Despite 76% disagreement with the proposal the DfE is still going to go ahead on the basis that they believe although it will be an additional pressure on schools, they believe of the cost of the additional £1.6Bn being announced in the Spending Review 2021/22 on top of the £2.4Bn from the Spending Review from 2019 that this mitigates and the removal of £41m grant, they believe Local Authorities will have sufficient funding. As long as the Local Authority can demonstrate it needs the money for School Improvement function, it would overrule the Schools Forum decision. We do need to guarantee funding to allow Clare Kershaw to carry out School Improvement function. It was a very late announcement yesterday. We are asking Schools Forum to support.It is noted that 4.6 and 4.7 in the report are no longer relevant paragraphs.Table 2 showed the funding that has been coming through the grant which started in September 2017. Based on the DfE proposal to cut funding we believe the allocation for 2022/23 will be £401k. There have been no academy conversions. There are 236 maintained schools. We would be seeking £478k from maintained schools which is £8.10 per pupil for 2022/23.JF responded there will be a significant number of people responding and indicating there would be difficulties. Our response is that it is an unfair burden on maintained schools because of the lack of consistency of funding and academies funded from the other grant. We should as a Forum respond and complain about the decision at this stage of it being unequitable funding. As there is insufficient time to scale back the serve the Authority needs to ensure it has sufficient funding to undertake its statutory School Improvement function. If maintained members of Schools Forum do not agree the proposal, the Authority will need to seek an adjudication from the Secretary of State to ensure sufficient funding for undertaking its statutory duties. NH stated as a maintained member that Schools Forum tried to get advice from other areas and the general feeling was that this is unfair, unequitable and a strong message to send back to the DfE that this is completely the wrong decision, and we should be continuing to press for this not to happen. I will definitely be voting against.SB agreed with JF. It is unfair only for maintained. It should be everyone paying this. SM said he agreed with what NH and SB said. It is grossly inequitable. We have to vote against this. It has to be pushed back to the DfE to make it clear that they are taking the funding away. HL understood the position and thought what would be most helpful is the timing and need to get clear wording from Schools Forum about the unfairness of the position it has placed us in. I understand completely about the dis-application position. RL also disagreed with the imposition of the Government and will vote against it. RL felt there is a need to get this point across.AP stated we will be replicating a lot of what we put in the consultation response and there is insufficient time to do this.**Recommendation****For maintained primary and secondary members to approve de-delegation for School Improvement at 5.3.****Voting****Of those eligible to vote, all 6 voted Against.**YSW stated we will send a dis-application to the Secretary of State. We have only got until the end of March to get the final budget out to maintained schools.AP informed we had a response from Schools Forum about de-delegation and we can check this.RL offered his support if it is required.YSW indicated Schools Forum will respond on behalf of the schools. |
| **3.** | **DSG Budget 2022/23 – Yannick Stupples-Whyley** YSW updated Forum on the School Funding Settlement 2022/23 and sought Forum’s approval in setting the 2022/23 budget. YSW also sought Forum’s agreement of the Dedicated Schools Grant (DSG) but for 2022/23.Table 2 showed the £2.3 billion from SR2019 which is allocated through the National Funding Formula (NFF). It was noted the £1.7 billion from SR2021 will be paid through a schools supplementary grant outside of the funding formula, see 4.16. Table 2 also showed the funding settlement for each block. YSW stated there has been a further increase of £12.6 million taking the increase in the settlement to a total of £53.4 million (4.2%). In addition, £37.3 million will be funded through a separate schools supplementary grant in 2022/23, taking the total increase to £90.7 million (7.2%).The DSG is still provisional, and the Early Years Block is funded 9/12ths on the January 2022 Census and 3/12ths on the January 2023 Census. The High Needs Block is also provisional and based on the January 2022 Census. The Schools Block has increased by £37.8 million (3.8%) due to the impact of the uplift in funding for 2022/23 of £26.1 million; the increase in pupil numbers from 197,477 to 199,370 of £10.5 million; and an increase in the growth fund allocation of £1.2 million.With regards to the Central Schools Block ongoing responsibilities has decreased by £119,000 to £7.5 million. The Local Authority has been disadvantaged by the DfE levelling funding between Local Authorities when the Block was formed. The reduction is capped at -2.5% but without capping the reduction would be £353,000The High Needs Block is £445,000 reduction in the provisional allocation which is due to a reduction of 94.5 pupils funded through the basic entitlement factor. This is being queried through the DfE as the Authority has not reduced place numbers in special schools. The provisional increase for the Early Years Block is £1.2 million (see 9.8 for proposed funding rates). The 2021 Spending Review had announced a 3-year increase in funding between 2022/23 and 2024/25, with an additional £160 million in 2022/23, an additional £180 million in 2023/24 and an additional £170 million in 2024/25. With regards to the Schools Supplementary Grant in 2022/23 schools will be allocated £1.2 billion as support for the costs of the Health and Social Care Levy and other cost pressures. The funding will be allocated through a separate Schools Supplementary Grant. The total allocation for primary and secondary schools is £29.9 million (3%).**Question**PL asked will the Schools Supplementary Grant be used entirely for National Insurance contributions etc? YSW explained it is there to fund the increase in the NI contributions but also it is a grant for additional pressures schools are facing but not specified what pressures are. The pupil premium rates were shown in Table 3. YSW stated we do have further increases in our requirement around the growth fund as pupil numbers increase. This was illustrated in Table 4. Section 6 referred to implicit growth (varying pupil numbers) and is an alternative method of funding significant change in pupil numbers. This was described in Table 5.YSW described the Falling Rolls Fund which provides funding for schools that have a temporary reduction in pupil numbers. School must meet several criteria to be eligible for funding including a 10% falling roll for 2 consecutive years, rated by Ofsted as Good or Outstanding and must be forecasting an increasing role in the third year of qualifying for falling rolls funding. It was noted there are currently no schools in the growth fund and no schools meet both the mandatory criteria for 2022/23. Therefore, no budget will be set for the Falling Rolls Fund for 2022/23.Delegated Budgets – Schools Block. The Local Authority has to submit this by 21/1/22 and it can only be changed the Education and Skills Funding Agency (ESFA). Any figures shown in Table 11 could potentially change but overall delegation will remain the same. Table 8 showed the funding for primary and secondary schools in 2022/23.Early Years Block – 4.14 outlined the increase in funding rates following the national £160 million uplift in funding for 2022/23. Due to the volatile nature of funding for the Early Years Block it would not be wise to fund the national increases until there is certainty that the Authority’s forecast hours will be funded. Greater certainty will be gained from the January 2022 Early Years Census. Should additional funding be allocated the Authority will look to further increase the funding rates for providers in 2022/23.Central Expenditure – Table 13 showed the proposed central expenditure for theEarly Years Block and the Central School Services Block for 2022/23. There hasbeen a slight increase in Early Years around costs for the Early Years Strategy,and the increase in combined budgets reflects the additional DSG income fromincreasing pupil numbers.There have been significant variations between 2021/22 and 2022/23 above £500,000 and these were explained under12.2. These were around place funding driven by increase and top up funding is increased through EHCP’s. Alsothere have been additional places in special schools and the PRU funding hasincreased. However, there has been a corresponding decrease in OtherAlternative Provision. YSW confirmed there had been an increase of £748,000 inSEN Therapies which reflected an addition 17% in therapy hours. It was notedthat there has been an £8.0 million increase in the HNB contingent costsreflecting the increase in income in 2022/23.12.4 showed a number of bullet points on how contingent costs have beenAllocated to recover the forecast deficit balance on 31st March 2022. It was used to fund the continuing increasing demand and price for EHCP’s and to fund theexpansion of the Inclusion Framework which is in the pilot phase to be expandedout across Essex.**Questions**DW, Tanglewood Nursery School, reflected this is her 5th year as a teacher. Every September I do not know what the funding is going to be, or what the funding will be post April. I was excited for the first thing about going to fund for the next 3 years and long-term commitment to maintain nursery schools. However, reading this I understand the pressures with the Local Authority. The reality is for many Early Years providers we have these children for one year. We are waiting to see the impact. These children do not get additional funding and we cannot do extra stuff that they need before starting school. At every meeting early intervention is key and important. Every Early Years provider wants to do the best and you look at funding. It has gone up but is still not enough. Primary schools got 3% uplift. It has not changed for nursery schools for the last two years. If you read all the communications in Essex and we have been left out again. It is just not good enough. Lots of Early Years providers are on committees but we are not. We have not been consulted. It is quite frustrating because we sit in an island on our own but we still have a good impact and are supporting providers and primary schools etc. It is about how we go forward. As a maintained nursery school, we are maintained but not allowed to apply for any grants, for example, to cover the costs of Covid. We are not allowed to apply for Early Years grants for the cost of Covid etc. You have secured funding for the PRU’s going forward, but for us what does that look like? Where do we stand here in this support? Every headteacher faces this battle year on year but we are not entitled to a lot of the support and funding that is there. Where is the support if we are not entitled to the money, we are due to get?YSW commented that the level of funding is based on the October Census which was lower than the 2220 Census because of Covid. Once we get the January Census, we will have a better idea of where the funding is. YSW responded this is the biggest block where there is uncertainty. Unfortunately, we do not do the financial allocation until the next financial year 2022/23. That is why the Early Years Block is so volatile. If January 2021 Census is lower than January 2022, the DfE take it away. We are not in deficit, and I have spent the last few years juggling it.RL suggested this issue is dealt with outside of the Forum and need a forum between Tanglewood, Woodcroft, Jeff Fair and Rod Lane and the relevant officers. Early intervention is key and we have listened to the pressures. RL felt it would not be possible to address the problem today.**Action**: YSW to contact the relevant officers to get this resolved. JB agreed it was important to voice this and other members voiced support and empathy and noted we do recognise the pressures. JB understood from the funding issue, from the PRU point of view, when you do not have children for very long, the funding does not meet the needs of the children. There should be a drive to solve that in the same way as they have done with the PRU’s.JF suggested we would need Ralph Holloway and relevant people from the High Needs Block involved. It is a difficulty of the structure based on children in front of them last year and the current year. You are funded for what you have got or not. RL agreed this should be taken offline and sorted out. PL spoke on behalf of mainstream schools and recognising and sympathising on Early Years and alternative provisions, what does it mean for mainstream schools? Are we better off?YSW referred to Table 10, £15.3 million increase for secondary schools and on top of that school’s supplementary grant over £29 million on DfE methodology.PL assumed we met the requirement before pupil funding. What is the funding of primary schools and secondary schools? YSW stated primary schools is a minimal increase and secondary schools a slight decrease. On top of this there is a supplementary grant and funding streams. PL asked are we going to get any more money next year? So much is surrounded by terms and conditions. JF reminded that the AWPU is basically the money not allocated. **Voting**: Overall majority accepted the recommendations.**Recommendations:**Forum noted the School Funding Settlement for 2022/23 including the allocation for each DSG Block at 4.5;Forum noted the funding for the PFI affordability gap at 8.2;Forum noted the delegation to primary and secondary schools at 9.4;Forum noted the allocation of the High Needs Block at 12.1;Forum noted the risks and opportunities for 2022/23 at 13.1;Forum agreed the growth fund for 2022/23 at 5.9;Forum agreed the funding rates for early years providers at 9.8; andForum agreed the central expenditure in the Central Schools Services Block and the Early Years Block at 11.1. |
| **4.** | **Scheme for Financing Schools – Yannick Stupples-Whyley**YSW updated Schools Forum on the outcome of the consultation with maintained schools on the proposed change to the Scheme for Financing Schools concerning premature retirement costs. YSW also presented the Authority’s final proposed change to the Scheme for Financing Schools which has been endorsed by the Finance Review Group. The Local Authority believed by going ahead with the detailed scheme under 4.4 that it will ensure consistency in all schools. JF added that we reflected on responses and how it is charged and trying to maintain and manage costs into the future. We are aware for some schools potentially there is difficulty and structures will need to work closely with the Local Authority. It was felt by FRG that it was appropriate to go ahead with this change.**Voting**Same people who voted for Item 2 – approved unanimous.**Recommendations**:Forum noted the result of the consultation.Forum accepted the recommendation of the Finance Review Group that the proposed change is implemented for 2022/23 at 4.4. |
| **5.** | This Confidential item is covered in a separate document. |
| **6.** | **Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies.****ASHE**STh reported continuing to cope with Covid for secondary schools with expectations placed in terms of testing students on return to school at the beginning of this term and a lot in the national press about schools coping with absence of staff and student absence. **EPHA**HPK reported different pressures. There is a huge amount of pressure in the primary system where there is ever changing guidelines and uncertainty. Normal activities are beginning to start very differently. Schools manage risks and risks are being updated to continue to ensure premises are safe. Daily the DfE give expectation of schools which is an external pressure. As well there are some behavioural challenges. There has been the impact of funding as well as staffing and administrative costs of the pandemic and not meeting the impact of Covid. HPK welcomed the establishment of a task force which HPK sits on as a voice for primary schools. It is a good focus and the support of the Local Authority to allow all to benefit from this task force. HPK is part of the SEN Working Group and discussing developing SEND funding across the county and all sectors. HPK highlighted following the primary school payroll transfer to Juniper which had caused distress and a huge increase in workloads. We continue to work with Juniper and lots of schools. EPHA offers support to teachers both in person and online and we do have some special schools who attend when it is relevant to do.HPK noted PL’s comment in the chat referring to Juniper payroll. She said there has been issues how ECC process it to Juniper in the first place and we have met with the Operations Team.**ESSET**EW reported staff and student notification rates regarding Covid is problematic. Special schools had considered closing classes. Funding is a significant issue. An impact for special schools having to create packages of support. Staff wellbeing across schools, our headteachers are doing an incredible job in challenging times. We had a survey recently. Feedback was that we could do more to support headteachers in unprecedented levels. There is a need to support that. There is ongoing therapy and working hard to understand needs. Some therapists have redeployed. There are ongoing concerns around school transport because of lots of new contracts and ongoing teething difficulties. With regards to the banding matrix, we are working as part of the SEN Funding Group collectively for everyone in all parts of the system. We are working together to get a constructive and useful outcome. **PRUs**PC reported it is incredibly difficult in terms of staff wellbeing and it had a big impact on the nature of young people we cater for who are vulnerable and have special educational needs. We have had resilience to deal with ongoing Covid and increase in costs of living which have been detrimental. We have had staff sufferance from various health issues related to the Covid crisis. We have kept Covid at bay but with Omicron we have got cases where children are ill as a result of Covid. PC has lost one of her headteachers as a result of levels of stress in the pandemic and impact on his wellbeing. JB stated there is always some level of disruption due to the population absence or staffing. Our attendance has been significantly affected throughout Covid and continues to feel that effect. With regards to Juniper payroll, we were particularly affected by that and want to record that has been a shocking service, the transfer from Essex to Juniper. We jumped ship because of this. It has caused additional workload and stress for a number of staff. On a positive note, we are excited by a new build and Wickford new build will be completed in March and also excited about Fairview.**Early Years – Nurseries**DW stated with regards to testing and Covid we had the other end of the scale. We have worked hard with our families to get them to do regular testing. Covid has had an ongoing impact on all of us. For our children it is looking at what needs to be put in place for them to go to school. Unfortunately, the last two years for children have not had access to anyone. It is about making sure they have support going into school. As well as the Juniper payroll, last year in September we found out via email that we will be an externally banking school and the pressure on finance officers has been huge which has impacted us too. On the whole this year we are trying to put Covid to one side and focus on our children and staff and getting children ready for their next steps.**ESGA**First meeting is tomorrow. RB stated there was not much to report. Lots of things on the agenda. We have sent out invitations to all schools for governors, trusts, members to attend a coffee and chat morning on 26th January 2022. There will be two sessions to discuss Prevent with our guest speaker. Meanwhile governors are supporting everyone. RB thanked Cllr Ball for his newsletter that has been circulated. **Unions**JF has been picking up a lot of worries from members about process, frustration about the DfE thinking further ahead and make an announcement so people can work well ahead and the impact with teachers. There have been more people contacting us about stress. Still told let’s open more windows. That is more of a problem than being told to do something again when got 10% of staff off due to Covid. **Unison**MS indicated things are fairly quiet but there are ongoing issues as have received reports from support staff about issues in school. There have been problems raised about Juniper and the payroll which affected the unions subs going out which has now been resolved. There are concerns around the budget because of impact on pupils and staff. Interesting to hear what has been happening on the ground and will report back to regional officers and branch secretary on this. **Church Rep** There was no representation and no report. **High Needs Sub-Group** items 3 and 5 on the agenda.**Finance Review Group** items 3, 4 and 12 on the agenda.**Early Years Sub-Group** item 10 on the agenda. |
| **7.** | **Minutes of 6th October 2021**Minutes were accepted as a true and accurate record of the discussion. |
| **8.** | **Minutes of 24th November 2021**Minor amendment from SM given to YSW for Item 2 where commented make it clear: SM also supported the LA proposal.**Action**: YSW to add the above. |
| **9.** | **Minutes Action Log**6/10/21 CK - regarding discrepancies provision. CK confirmed she did do an email response. RH is looking into this.6/10/21 YSW – school balances. YSW is working on and this will go to FRG and report back at the May Forum.24/11/21 – YSW – Schools Forum response was submitted in Item 2, Annex B. |
| **10.** | **Early Years and Childcare Update – Carolyn Terry**CT updated the Forum on the forecast outturn position for 2021/22 of the two-, three- and four-year-old Free Early Education Entitlement (FEEE), including the Early Years Pupil Premium (EYPP). CT update the Forum on indicative Early Years Block allocation for 2022/23. CT also updated the Forum on the impact of Covid-19 on the Free Early Education Entitlement funding.Section 4.2 set out the current take-up of free entitlement. The take-up of the two-year-old FEEE during the Autumn term 2021 was 3,556, which was 83.8% of the 4,244 eligible two-year-olds in the county. This is significantly higher than the national take-up level for the Autumn 2021 term of 61.8%. CT reported the take-up of the universal three- and four-year-old FEEE at the Autumn term 2021 headcount was 17,690. This is 95.2% of the eligible three- and four-year-olds. This is consistent with previous take-up levels.Despite the ongoing impact of Covid during the Summer and Autumn terms, children have continued to access their FEEE funding with their Early Years provider. Section 5 set out the funding position for 2021/22. 5.4 gave an overview of spend against each budget line. CT informed we are expecting a potential clawback of underspend around two-year, three-year old funding and nursery funding. There is a need to look at the January Census for any increase in take-up. In 5.7 Table 3 showed the provisional allocation for 2022/23. Table 4 showed the proposed funding rates as shown in Agenda Item 3. Section 6 set out the impact from Covid. The areas set out in 6.4 to 6.7 will be kept under review. **Schools Forum Early Years and Childcare Reference Group**The Schools Forum Early Years and Childcare Reference Group has continued to meet during 2021, with ongoing representation from all Early Years sector types and each district.Key areas of discussion have been around members concerns on the 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.This is borne out by the significant increase in applications to access the Early Years Inclusion funding leading to further budget needing to be added in response to the demand, and the increased waiting times for assessment by Health, such as speech and language therapists and paediatricians is further adding to these concerns. ECC are already undertaking a review into the SEN offer and early years and childcare providers have been invited to attend a series of workshops starting in January 2022 with the purpose of engaging with the sector on possible solutions to these issues.Future meetings have been scheduled to coincide with reporting to Schools Forum.**Questions**SM voiced his feelings as a member of the Schools Forum. He felt uncomfortable to hear the difficulties with maintained schools and he appreciated that CT does a difficult job. The situation where rates of funding for Early Years has been shared with Schools Forum and then later in the meeting there are concerns of considerable discomfort. YSW responded about the underspend. It is one off money and cannot be used to increase rates. The difficulty of the Early Years Block is the two examples. Whilst we have not had the January 2022 Census, if that is lower than January 20221 even though it has been money out, that can easily come along and wipe out the surplus which the Local Authority faces. SM – All I am saying can we continue to look at this and work hard on this as quickly as possible, as these children are only there for one year.CT stated we were previously in a deficit position to pay back over a number of years. It is a very fluid budget. If submitted in the Autumn term the only pressure is a one off. As soon as we can be as comfortable as we can, we will work to get the money out to the sector. **Voting**: Accepted both recommendations unanimously.**Recommendations**:Forum noted the Early Years Block forecast outturn for 2021/22 at 5.4.Forum noted the provisional funding for 2022/23 at 5.7. |
| **11.** | **Constitution & Membership of Schools Forum – Yannick Stupples-Whyley**YSW brought this 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 numbersTable 3 showed a breakdown of pupil for primary and secondary between maintained schools and academies as at the October Census 2021. It was noted there had been no academy conversions since 1st April 2021.In terms of membership of the Schools Forum in Annex A:Nigel Hill, Sean Moriarty, Richard Green and Mark Farm – last meeting will be November 2022. Everyone else is 20223/24.Annex B showed Schools Forum attendance. There have been concerns we have with membership attendance by the church members. We will be writing to them to remind them of the Terms and Conditions of the membership.In terms of the High Needs and FRG attendance was shown. **Questions**JF highlighted his current term of office is due to end at the end of January 2022 and HPK is in May 2022. YSW informed the Unions supported the extension for 4 years until 2026.**Recommendations**:Forum noted the arrangements for how meetings will be held at 3.1.Forum noted that no changes are required to the constitution of Schools Forum at 3.5 and 3.7.Forum noted Membership at Annex A and Attendance at Annex B. |
| **12.** | **Third Quarter Budget Update – Yannick Stupples-Whyley**YSW updated Forum on the outturn position for the year-ended 31st March 2022 for both the Schools Budget and Education Functions.**Schools Budget:**The forecast outturn for 2021/22 at Quarter 3 (November 2021) was set out in Annex A. The total forecast dedicated schools grant allocation for 2021/22 after academy recoupment is £525.3 million. **Central Schools Services Block:**There is an overspend of £3.7 million.**High Needs Block**:There is an underspend of £5.3 million.Table 2 showed the risks and opportunities for 2021/22 that are not currently in the outturn forecast.Table 3 showed the forecast DSG position on 31st March 2022.Tables 4 and 5 showed agreed funding as agreed by Schools Forum on9th December 2021 and 13th January 2022. There is a small underspend on educational welfare and there was also noted a small underspend on premature retirement costs. **Recommendation**:The Forum notes the forecast outturn position at 31st March 2022. |
| **13.** | **Forward Plan****Recommendations**:The Forum noted the dates of future meetings.**Dates of Meetings**Wednesday, 18th May 2022Wednesday, 13th July 2022Wednesday, 28th September 2022Wednesday, 30th November 2022Wednesday, 11th January 2023Also additional items as proposed by Schools Forum are included in the Forward Plan. |
| **14.** | **Election of Chair / Vice Chair - Yannick Stupples-Whiley**This was to agree the Chair and Vice Chair for the next set of financial year meetings. Rod Lane has agreed to stand as Chair again. There were no further nominations. The majority of those present voted for Rod Lane to continue as Chair.Jeff Fair is willing to stand again as Vice Chair. There were no further nominations. All agreed in voting for Jeff Fair to continue as Vice Chair. |
| **15.** | **Chair’s Closing Comments** (Rod Lane)RL thanked everyone for attending and for their contributions. RL wished everyone all the best for 2022. RL looked forward to meeting with everyone at the next meeting (as below).**Date of next meeting – Wednesday, 18th May 2022 at 8.30 a.m. via Teams.****Post meeting note:**Pam Langmead has given her apologies for 18th May and 13th July 2022. |

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| Schools Forum | **Agenda Item 7** |
| Date: 18 May 2022 |  |

Minutes of 21st April 2022

**Schools Forum Extraordinary Meeting Minutes of Thursday, 21st April 2022**

**Via Microsoft Teams**

**08.30am – 09.53am**

*(subject to forum approval)*

In Attendance

|  |  |  |
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| Rod Lane (RL) – Chair | Jinnie Nichols (JN) | Simon Wall (SW) |
| Jeff Fair (JF)  | Ruth Bird (RB) | Luke Bulpett (LB) |
| Pam Langmead (PM) | Simon Thompson (STh) | Carole Herman (CH) |
| Richard Green (RG) | Harriet Phelps-Knights (HP-K) | Ruth Sturdy (RS) |
| Philomena Cozens (PC) | Nigel Hill (NH) | Emily Welton (EW) |
| Lyn Wright (LW) | Claire Styles (CS) | Sue Bardetti (SB) |
| Paul Banks (PB) | Marilyn Smith (MS) | Mark Farmer (MF) |
| Debs Watson (DW)  | Dan Woodman (DW) - observer | John Revill (JR) |
| Ferliene Willis (FW) | Ben Bryant (BB) - presenter | Jo Santinelli (JS) |
| **LA Officers** |  |  |
| Yannick Stupples-Whyley (YSW) | Andrew Page (AP) | Ralph Holloway (RH) |
| Clare Kershaw (CK) | Val Cleare (VC) - Minutes |  |

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| **1** | **Apologies for Absence and substitute notices**Rod Lane welcomed everyone to the Teams meeting. Apologies have been received from Sean Moriarty, Jo Barak, Suthan Santhaguru (new Church of England representative), Cllr Tony Ball.Ben Bryant, Consultant from ISOS Partnership was welcomed.  |

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| **2** | **SEND Top-Up Funding Review – Ralph Holloway and Ben Bryant**The purpose was to update Schools Forum on the progress of the SEN top-upfunding review. RH notified Schools Forum on the next steps and plans forimplementing the review. The draft operational guidance was shared. Schools Forum’s views were sought on the sectors to be included in the first year of thetwo-year implementation period. A summary of the working group’s proposalswas last presented at the Schools Forum held on 24th November 2021.Ben Bryant gave a presentation summarising the work done and proposals developed. Ben picked out three main areas: key over-arching measures, recapped on the process led and key products, the proposed approach toimplementation phase of the work.The Essex system around top-up funding is in need of reform. In the Green Paper it talks about develop, testing and consistent approach to banding. Itsuggests whatever cost out at national level there will focus on high costprovision. Local areas will need a reasonable strong approach and to have arobust set of principles for top up funding. The Green Paper also talks aboutpiloting.Ben summarised over-arching messages. There are different approaches in thesecond phase of the work. It was noted this review is being undertaken from aposition of strength; an easy to understand, transparent, sustainablemethodology. There is wider work responding to the local area SEND inspectionand improving the SEND system. Important point we have undertaken this workfor SEN top-up funding review and around SEN work. ISOS Partnership is working in partnership to ensure working closely withcolleagues from Early Years, across all Education and Health Services to ensurethis work is broadly understood and informed. We have already tested with thewider group of SENCO’s, colleges, special schools etc. The implementation isriskier. Ben explained this is a two-year process. It will be vital for leaders ofthe system including Local Authorities, High Needs groups and the SchoolsForum to ensure oversight, and to have a coherent, sustainable, fair anduniversal approach to top-up funding.Ben talked through the process about how and by whom, what is the decisionmaking process to ensure that the tool is used consistently and effectively. Theprocess we followed was capturing the case for change, then looking at modelsused in a range of top-up funding in other areas and based on evidence of needand elected top-up. A universal model is a needs-led model to be used. Welooked at the methodology which outlined all the banding framework anddescriptors for four main areas of practice. We have tested this throughcomprehensive iterations.The second product is process and practice around use. We had a workinggroup where decisions made and how to align with plans and annual reviews.There are key decisions about top-up for children with EHCP’s which will betaken through the quadrants where they are in line with direction of travel in theGreen Paper about informing about education EHCP’s and plans. This is themechanism to deal with requests for exceptional cases where a young person isin short-term circumstances cannot be accommodated for this. We have built thisin. For some young people there may be reasons where they cannot beaccommodated for this because of something severe that has happened in theirlives. We are working to ensure there is really good data, reporting and oversight,use of/and requests for exceptional circumstances. There will be a regularreview on how the system is working and follow-ups can be addressed. Implementation – key main decisions explored were firstly the approach to betaken to implementation, phase in with new EHCP’s. Our proposal is for a sectorby sector approach over two years. There was a question over who does thebanding – Local Authority or settings. It was suggested a hybrid modelmoderated at county level. There was a question about how do we are setting upfunding values? The exercise is not about setting value of top-up funding and ifeveryone seeks a higher band. We are saying what is the quantum for eachsector and how do we ensure this remains within the budget and the distributionfor the levels of need. It is a system of six steps: financial modelling, bandingexercise, further financial modelling, moderation exercise, financial fundingmodelling, rollout. Ben described the implementation phase of the project, proposals and set oftimescales over the two years from September 2022/23 (Year 1) and September2023/24 (Year 2). The first group will move towards the finance bands and rolloutNovember 2022-September 2023. Then the second group will be dealing withfinancing top-up banding. Implementation options for special schools in Year 1 for2022/23 and mainstreams schools in Year 2 for 2023/24. Enhanced provisions – need to be clear on what commissioned to do in Year 2.Early Years is slightly complicated as the Local Authority require top-up fundingfor EHCP’s and inclusion fund. We are doing work on how this banding will align.There will be a Task and Finish Group in the next two weeks to sort this out. SENand top-up funding in Early Years – given to push this into Year 2. Post 16 – we think there are strong reasons for wanting to move quickly away from individualtop-up funding to this system – Year 1. There are five key risks. Risks 4 and 5 – there are good mitigations, consistencyof decision making. The other three decisions are around communications andtraining with this approach. Also the quality of evidence if need-led system,EHCP needs – work going on report writers training and QA. Communicationsrisk remains a level risk to be mindful of and monitor in implementation phase.The third risk is about the capacity Local Authority staff leading, but whole systemand process of IT systems to ensure we can manage as best we can.How the work will be overseen – The Working Group felt there was real value tocontinue to come together as a cross sector, cross partnership to continue tooversee the work, to be brought together at key milestone points in the process.There will be another meeting this term for implementation plans and approach toa number of communications programmes. The detailed work will be undertakenby a group within ECC made up of Senior Leaders to implementation. There wasgreat emphasis on the role for system leaders. For example, on the workinggroup we have had representatives from ASHE, EPHA, ESSET, other sectors.Crucially system leaders are aware of the members, aims of thiswork, key messages to communicate so that they can support, mainly for thoseand how the system is intended to work. Also, by monitoring that it is telling uswhat we want it to tell us.We are keen to get your views if you are happy with the proposals and progressso far and also you are happy with the proposed approach sequencing in termsof implementation.**Questions**MF – Thank you for the presentation. I have read the Green Paper. Doesanyone in the group know what the proposed timescales are for the Green Paperto become a White Paper?Ben – our Year 2 proposal is September 2024. If the Green Paper turns quicklyinto the White Paper and then in September 2025 is the timescale longer than we think?RH – We put to the DfE on the day of the Green Paper. Timescales, do not move quickly from Green to a White Paper and suggested 4 years. It is an opportunityfor Essex to lead the agenda rather than responding to the agenda. Use thework we have done and suggest to the DfE to rollout initially.Ben – the risk the DfE moves seems very low. We feel quite confident it is worthgoing ahead with this now. Regardless of the timescales is there a risk nationallywe have to undo what we have done? Ben thought it was quite low. If you lookin the different part of the Green Paper, multi-agency that has carbon copy ofwhat ECC wanted to put in place for two years. We looked at different models inother areas in SEND inspections. It is a fair chance it will take on board whatmost local areas are doing. There is always a risk. Whatever goes out aboutbanding work from the DfE, will stand us in good stead and shape what we aredoing.CS – tell us about the outcomes of the deciding and what key insights showed?Ben – we did 3 runs of deciding. Firstly, we took a set of banding descriptorsFrom Bath and East Somerset. We held meetings with various education institutions. Then we asked members of the working group to go back into theirsettings and worked with SENCO’s etc. and apply and bring back comments. The final key thing, we took three anonymous cases in Essex and asked all those groups to band in the new framework and testing is the banding framework strong enough. We got good amount of feedback. The key message was that the framework is robust, easy to use and broadly speaking did not get any major rejection how it was set up.Secondly, interpretation of the system. Do we get differences in terms of different sectors/services who come to a different conclusion of young people? We got good news to follow up. There were some differences in two cases. A very young child in Early Years, early Primary, where a set of presented behaviours and apparent needs where down to language or sensory needs can be quite challenging to unpick. It was reassuring on that front. Another person who had SEMH and autism differences and they were quite complex cases. We asked people to do testing in isolation. In future when the system is up and running and there is a primary need SEMH or related to autism, those are debates you would have then. Differences in certain sectors have slightly higher or lower to pick up in the training and ensure we give the tools to apply consistently. Thirdly, quality of evidence. We are looking at 3 EHCP’s and picking up on some of the challenges, deriving the information in order to build the EHCP needs assessment and plan, and agree the level on top up funding based on reports written by professionals. RH has been leading on strengthening of report writing for EHCP and ensuring QA of plans.**Adjournment – 9.25am – 9.32am**Emily Welton spoke representing special schools around the first phase. She asked is there any more detail at this point and what would that look like. Banding for special schools, is it the schools who complete this? How will it be done? Capacity within schools to be done and whether done through annual review. The point about consistency – there is a back ups risk and consistency system implemented. Outcomes of the testing and data you can share percentages each of case studies band C, D, F and G and information about this.Ben indicated with regards to second question, any conversations with some of those sectors we will be explaining and unpicking why that is the case. There were three cases, one was very different. The second was the difference of one band above for two groups that completed it. The purpose of the exercise was not to identify banding or under-banding but to inform the conversation we want to have with those groups. I think we had a point where we needed to have a more constructive conversation. We have a similar conversation through the training on the new banding framework where we will put some cases together for people to learn through the training programme. Ben agreed the risk and RH will echo this. We have emphasised throughout that we have a well-chosen system. With regards to the first question about implementation, on the timetable we will be asking all settings to band their young people. It is better for the system and the work is shared more collectively. We start the process later this term to brief people about the system and how the framework works. The timeline will be October half-term and that is why we want to get briefings done early, so that we can make a start on the banding early. For example, what it looks like, what it involves and how.CS asked regarding the parental guidance documents. Who is this document for? Is there a case that this document can be used for SENCO’s and Leaders to guide them through the process? It is for the people going through that initial banding process. Ben responded there is a suite of documents developed over the last two years by ECC giving guidance etc. It is designed to give accessibility to anyone who has an interest in it. There is information on operational guidance.How to use the banding descriptions to identify band for a chair? CS suggested people might look for very specifically to help guide them through the process. Ben commented, yes, the material in the document people have been using but did not give them the document when doing the testing. We developed the document with the group. Ben indicated the challenge was more around consistency and interpretation of need and quality of evidence people were looking for. CS asked will the document give case studies as well? Ben responded he has no experience of doing this. For the different types of need, high needs in each different type of need, is there a gap? You pick the biggest one. With regards to case studies this is not envisaged. If you have this profile, this is where they would be on the banding system. However, through the training regularly refreshed and rolled out, the case studies form part of the training. CS enquired how does this actually work? Where the evidence of the need for each type of need, are they banded C or D? You are picking the area of primary need, the highest band. What we have not done yet is say that band 3 is X amount of money. The reason for that since we put the amount of money in, all this goes out of the window. Justifications about what top-up levels for each band. It is not set in stone. We are dealing with a quantum of money and split between X number of bands. If we get lots of people pushing for higher bands, it may change the value of top-up for each band. RH stated we will ensure that we record training sessions so that they are readily available and share all the materials so that they can be accessed any time. We'll also hold drop-in sessions over the course of the implementation (and beyond) to support those doing the work both in schools/settings and at ECC.LW asked could you also consider introducing a system whereby there is another level of sampling/ quality assurance? May be school on school?PL enquired following this meeting will there be an introductory briefing paper for schools for example? PL is running headteacher briefings over the next few weeks and it would be very helpful to introduce this. RH agreed to do this.SB mentioned it is to be moderated by the Local Authority. Is it every single case? What evidence are you expecting schools to send for that moderation? This is another massive piece of work. What kind of evidence would be expected for schools to send to go through the moderation process? Ben indicated we are envisaging the training process would be extended to invite SENCO’s, school leaders and business managers. Different settings within have different people involved in that. In terms of who does the moderation and how many, we are suggesting this will be done on a sample basis. The Local Authority will moderate a sample of those submitted by schools and colleges. What proportion would be a decision to be made. Our advice is that you want to be banding initially around 10-20%. If you band 10% and moderate, and most are accurate, you can be quite confident. We could make it up to 15-20% tosatisfy things are reasonably ok. In terms of the evidence. The benefit is we are working from reports that have gone into EHCP and annual reviews. Schools are not asked to produce any new evidence beyond that need. Work will be done in the original EHCP or annual reviews. It is envisaged the benefit of the moderation is in the dialogue that would take place between the Authority, school, setting or college. Are your bands broadly consistent with other similar young people? It is an opportunity to reinforce and impede consistency and approach. RH added with regards to consistent data, schools where banding looks different, we can trace those concerns. We have a system in Essex for EHCP assessments and have good representation at panels, and as part of the QA. We can extend to schools as part of the moderation process, so it is not just ECC. CS would like to be part of that process to understand it better.RS understood the process. However, if you are expecting special schools to do it by the October half-term, that is 19 working weeks. It is not very long to do 250/260 reviews of banding. It is a big piece of work that special schools will have to undertake. RS urged if we could do the training and development quickly. There will still be a concern for schools to get it done properly and in time. Ben stated we have recognised in planning this with RH about who should need to get the training done quickly. We have had discussions and know the importance of this. It is helpful you have come to the same conclusion. It is a big piece of work, and we want to get on with the work. That is why we suggested special schools to be part of the one cohort. There is an order of priority. We are looking to move training from special schools and colleges at the forefront of this. Ben and RH have meetings next week about the planning of this.Ben believed the key question in RH’s paper is we need to note the progress from the comments people have made. Ben has taken CS’s point who the guidance document is for, and we can do it. Also, SB’s comment was noted as part of the exercise to make it transparent and in line with the decision making as part of the system going forward. People are happy where we have got to. The question is to propose an implementation plan and the sequencing of the sectors. We need to ensure people are absolutely happy with that as an approach. We have clear plans across this term and will update through Schools Forum as we go through this process.**Voting**Agreed 20Abstained 2**Recommendations**Schools Forum noted the progress of the review and the content of the draft operational guidance (Annex A pages 1-18 and Annex B);Schools Forum noted the next steps and plan for implementation (Annex A pages 19-27);Schools Forum approved the proposal for special schools, post-16 and all new plans be covered in the first year of the implementation of the proposals, as recommended by the High Needs Review Group at 4.4 (Annex A page 25). |
|  | **Chair’s Closing Comments** (Rod Lane)RL thanked everyone for attending. RL thanked BB for the presentation and RH for his support. **Date of next meeting – Wednesday, 18th May 2022 at 8.30 a.m. via Teams.****Post meeting note:**Pam Langmead has given her apologies for 18th May and 13th July 2022. |

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| Schools Forum | **Agenda Item 8** |
| Date: 18 May 2022 |  |

**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 |
| 12th January 2022 | Agenda Item 3 – DSG Budget 2022/23 | Yannick Stupples-Whyley | To convene a meeting with the maintained nursery heads to discuss funding concerns. | Meeting held on 18th January 2022. | Complete |
| 12th January 2022 | Agenda Item 8 – Minutes of 24th November 2021 | Yannick Stupples-Whyley | Amendment required to Agenda Item 2 comment made by SM | Minutes were corrected. | Complete |

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| Schools Forum | **Agenda Item 9** |
| Date: 18 May 2022 |  |

**REPORT TITLE: EARLY YEARS UPDATE**

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 draft outturn position for 2021/22 of the two, three & four year old Funded Early Education Entitlement (FEEE), including the Early Years Pupil Premium (EYPP)
	2. To update the Forum on the impact of Covid-19 on the Funded Early Education Entitlement funding
2. **Recommendations**
	1. That Forum notes the Early Years Block draft outturn position for 2021/22 at 5.3.

###### 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. |

1. **Background**
	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.
	2. Across Essex, currently 24.6% of all two year olds are eligible to access the FEEE funding.

The take-up of the two year old FEEE during the Spring term 2022 was 3,418, which was 82.7% of the 4,131 eligible two year olds in the county. This take-up figure is slightly down on the previous term of 83.8%, but still significantly higher than the national take up level for the Spring 2022 term of 61.8%.

* 1. The take up of the universal three and four year old FEEE at the Spring term 2022 headcount was 22,587. Which is 94.9% of the eligible three and four year olds. This is slightly lower than the previous term take up of 95.9%.
1. **Financial Implications**

5.1 The Early Years National Funding Formula is funded on both the January 2021 Census (9/12ths) and the January 2022 Census (3/12ths). The original allocation announced in December 2020, **£86.4 million**, was based on the January 2020 Census. In December 2021 the DfE updated the 2021/22 allocation based on the January 2021 Census. This resulted in an allocation of **£84.3 million**, a reduction of **£2 million**.

5.2 The Authority is allowed to retain 5% (**£6.4 million)** of 3 and 4 year old funding but the actual retention in 2021/22 was **£3.4 million** (1.1%)

5.3 Table 2 shows a breakdown of the draft outturn position for 2021/22.

|  |  |  |  |
| --- | --- | --- | --- |
|  DSG Early Years Block 2021/22 | Allocation£ | Outturn£ | Variance (Under)/over£ |
| FEEE2 Offer | 8,969,286 | 9,484,329 | 515,043 |
| FEEE 3&4 PVI (Inc. EYPP & SD) | 62,006,151 | 62,102,248 | 96,097 |
| FEEE 3&4 MNS & SNC (Inc. EYPP & SD) | 10,451,736 | 11,222,127 | 770,391 |
| EYCC SEND Support | 1,300,000 | 1,300,000 | 0 |
| EYCC QI Team | 305,997 | 279,006 | (26,991) |
| Early Years Quadrant Teams | 763,764 | 704,617 | (59,147) |
| Education Service Recharge | 151,125 | 151,125 | 0 |
| Corporate Overheads | 401,131 | 401,131 | 0 |
| Total | **84,349,190** | **85,644,583** | **1,295,393** |

5.4 It can be seen there is a **£1.3 million**  overspend due to the impact of Covid-19 on the number of children attending settings in January 2021. This is detailed in the Draft 2021/22 Outturn report at agenda item 10.

5.5 The impact of the 2021/22 outturn position reduces the early years block surplus to **£2.5 million**. The final allocation for 2021/22 will be released in July 2022. Based on the January 2022 Census the Authority is estimating that due to an increase in children attending settings compared to January 2021, an additional allocation of **£1 million** is due, which if confirmed by the DfE will result in a **£3.5 million** surplus.

1. **Update on the impact of Covid-19 on the Funded Early Education Entitlement**
	1. The childcare sector is fully operational offering the full range of FEEE places.
	2. The number of eligible children accessing a FEEE funded place has remained broadly consistent throughout the financial year, with the take up % for eligible 2 year olds across Essex continuing to be considerably higher than the national average.
	3. Although there does continue to be a proportionately very low number of providers informing ECC that they have taken the decision to close permanently as a result of sustainability issues caused by Covid-19, the number of providers seeking advice and support on sustainability is increasing. This has been caused in part by the financial impact of Covid, but there are additional financial pressures impacting the whole economy, which is affecting the sector, the detail of which is set out in Section 7
	4. As previously reported, due to the ongoing uncertainty of the funding levels that local authorities allocation of the current surplus budget to providers continues to be paused. As set out in 5.5, the surplus balance has reduced to **£2.5 million**. The Spring 2022 Early years Census shows an estimated **£1 million** increase to the allocation. The Authority is considering options for an initial **£1.5 million** of the surplus to be allocated, with further funding allocated once the final 2021/22 allocation is confirmed. Given the volatility of funding it is proposed to keep **£1 million** as a safety net. The proposals for allocating the funding could comprise of:-
* A one-off of payment to all early years and childcare providers offering the Funded Early Education Entitlement funding proportionate to the level of funded hours provided7
* Additional resource to support providers with the increasing needs of children
* A sufficiency grant to support any providers in areas where there is already a lack of sufficient childcare. Any grant will prioritise support to areas where there are concerns that providers closing will lead to a shortfall of early years and childcare places and will only be considered after all other options have been considered.
	1. The areas set out in 6.3 to 6.4 above will be kept under review. Detailed proposals will be brought to the July / September meeting.
	2. ECC has continued to issue regular communications and updates to the early years and childcare providers to provide support and access to all available information.
1. **Schools Forum Early Years and Childcare Reference Group**
	1. The Schools Forum Early Years and Childcare Reference Group has continued to meet during 2022, with ongoing representation from all early years’ sector types and each district.
	2. Key areas of discussion have been around: -
		1. Members’ concerns on the 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. This is borne out by the significant increase in applications to access the Early Years Inclusion funding leading to further budget needing to be added, for the last financial year, in response to the demand, alongside the increased waiting times for assessment by Health, such as speech and language therapists and paediatricians is further adding to these concerns.

ECC are already undertaking a review into the SEN offer and early years and childcare providers have been invited to attend a series of workshops. These started in January 2022, with some more scheduled for the Summer 2022 term with the purpose of engaging with the sector on possible solutions to these issues.

* + 1. 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. The FEEE hourly rates were increased from the 1 April 2022, but the sector is telling us that, whilst the increases were welcome, it will only help to narrow the financial deficits.
		2. Recruitment and retention of qualified staff is continuing to be an increasing issue for the early years sector. Work is underway to understand this issue further and seek solutions to help ease any impact this will cause.
	1. These pressures are impacting in a number of ways: -
		1. A small expected increase of closures in the coming months
		2. Childcare providers limiting the number of FEEE hours a child can access in a day to enable the providers to maximise their income due to the gap between the FEEE levels and the cost of providing the place.
		3. Childcare providers introducing more consumable charges to be paid for by parents to help mitigate the shortfall of income.
		4. Both of the two points above mean parents needing to pay for more for their childcare
	2. Discussions on these points, and others as they become apparent, will continue to be had with the Schools Forum Early Years and Childcare Reference Group, to capture the pressures and work together to seek solutions to mitigate.
	3. Future meetings have been scheduled to coincide with reporting to Schools Foru

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| Schools Forum | **Agenda Item 10** |
| Date: 18May 2022 |  |

**REPORT TITLE: SCHOOLS BUDGET DRAFT PROVISIONAL OUTTURN REPORT 2020/21**

Report by Yannick Stupples-Whyley

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**1. Purpose of report**

* 1. To update Schools Forum on the draft outturn report for the year ended 31 March 2022.

**2. Recommendations**

2.1 That Forum note the outturn position for the year ended 31 March 2022.

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

3.1 Table 1 shows the relevant responsibilities that Forum has in relation to the Schools Budget, which are taken from the Education and Skills Funding Agency’s **Schools forum powers and responsibilities** published in September 2018.

|  |  |  |
| --- | --- | --- |
| Local Authority | Schools Forum | DfE |
| De-delegation – proposes | Decides | Adjudicates where Forum disagrees with the Authority’s proposals |
| General Duties for maintained schools – proposes | Decides | Adjudicates where Forum disagrees with the Authority’s proposals |
| Growth Fund and Falling Rolls Fund – proposes | Decides | Adjudicates where Forum disagrees with the Authority’s proposals |
| Central Spend on Early Years and Central School Services – proposes | Decides | Adjudicates where Forum disagrees with the Authority’s proposals |
| Central Spend on High Needs – Decides | None, but good practice to consult. | None |

**4. Financial Implications

Schools Budget**

4.1 The outturn for 2021/22 is set out at Annex A to this report.

4.2 The total dedicated schools grant received in 2021/22 after academy recoupment was **£523.0 million**.

4.3 DSG in 2021/22 was under spent by **£5.5 million**. Table 2 shows the movement in the overall DSG balance between 1st April 2021 and 31st March 2022.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Schools Block£m | Central School ServicesBlock£m | High Needs Block£m | Early Years Block£m | Total£m |
| Opening Balance – 01/04/21 | (0.1) | (3.2) | 5.9 | (4.3) | **(1.7)** |
| 2021/22 adjustments:EY 20/21 adj. |  |  |  | 0.5 | **0.5** |
| Revised Balance | **(0.1)** | **(3.2)** | **5.9** | **(3.8)** | **(1.2)** |
| 2021/22 Outturn | 0.1 | 2.1 | (9.0) | 1.3 | **(5.5)** |
| DSG Balance 31/03/21 | **0.0** | **(1.1)** | **(3.1)** | **(2.5)** | **(6.7)** |

4.4 The High Needs Block has returned to a surplus position

4.5 The outturn variations contributing to the 2021/22 outturn position are as follows:

 **Schools Block - £60,000 overspend**

4.5.1 The overspend reflects an increase in the number of growth places required above the original forecast.

4.5.2 The Schools Block balance does not reflect the **£5.6m increase** in maintained school balances which is held in a specific reserve. Full details of school and academy balances will be brought to the July meeting.

**Central School Services Block - £2.1 million overspend**

4.5.2 The predominate cause of the overspend **£2.9 million** is the agreed additional contribution from the CSSB to the SEND & PRU capital project.

4.5.3 There is an underspend (**£771,000**) within the school effectiveness partners team due to expenditure relating to the Authority’s statutory duties being charged to the School Improvement Monitoring and Brokerage Grant.

**High Needs Block - £9.0 million underspend**

4.5.4 Top-up funding for Maintained Providers - **£553,000 overspend**

The overspend is due an increase in the number of Education and Health Care Plans (EHCPs) within maintained schools.

4.5.5 Top-up funding for Academies, Free Schools and FE Colleges - **£281,000 overspend**

The overspend is due to an increase in the number of EHCPs in academies (**£1.3 million**). This is mostly offset by an underspend (**£1.0 million**) for Post 16 FE where there is a reduction in the number of learners than forecast.

4.5.6 Top-up funding Independent Providers - **£974,000** **overspend**

The overspend is due to an increase in the number of placements and due to an increasing complexity of pupils.

4.5.7 SEN Support Services - **£7.4 million underspend**

 The underspend relates to the following:

* Headroom due to the increase in funding for 2021/22 **£6.3 million** underspend.
* Enhanced Provisions under spent (**£812,000**) due to only 326 of the planned 431 places being occupied by Essex pupils.
* An additional 160 individual pupil resourcing agreements compared to 2020/21 resulted in an overspend (**£698,000**).
* Vacancies across the quadrant SEND teams resulted in a **£457,000** underspend
* Due to the pandemic, there was a reduction in SEND support required in early years settings **(£439,000** underspend).

4.5.8 Other Alternative Provision Services - **£3.5 million underspend**

The underspend reflects a significant decrease in demand for excluded pupils placements (**£1.8million** underspend). In addition, the average number of weekly hours per pupil accessed through the IPES framework were less than anticipated (**£1 million** underspend) and one provider became an independent school which transferred **£600,000** expenditure to the Independent Schools budget.

4.5.9 Therapies and Other Health Related Services - **£178,000 overspend**

The overspend reflects an increase in therapy hours required.

**Early Years Block - £1.3m overspend**

4.5.9 Due to the impact of COVID19 the January 2021 Census was lower than the January 2020 Census resulting in a clawback of **£504,000**. This reduced the early years block surplus balance to **£3.8 million**.

4.5.10 In January the DfE adjusted the 2021/22 allocation based on the January 2021 Census, The allocation reduced by **£2.0 million**, resulting in an overspend on provision of **£1.4 million**, which has slightly been offset by staffing underspends (**£86,000**) resulting in an overall **£1.3 million** overspend.

4.5.11 The January 2022 Census shows a 5.4% increase in children accessing the free early years entitlement compared to January 2021. The Authority forecasts this increase will increase the final 2021/22 allocation by **£1 million**.

**Education Functions**

4.6 At the meeting of 9th December 2020 Forum agreed the authority’s proposals for all schools shown in Table 3.

|  |  |
| --- | --- |
| Education Functions – All Schools | £’000 |
| Education Welfare | 1,170 |
| Strategic Management | 1,577 |
| Asset Management | 333 |
| Total | **3,080** |

4.7 At the meeting of 13th January 2021, maintained school members agreed to de-delegate from maintained school £36.50 per pupil to fund the services shown in Table 4.

|  |  |
| --- | --- |
| Education Functions – Maintained Schools | £’000 |
| Asset Management | 344 |
| Statutory & Regulatory Duties | 1,865 |
| Total | **2,209** |

4.8 There were no academy convertors during 2021/22 so no recoupment was necessary.

4.9 Table 5 shows the provisional outturn which is an overspend of **£76,000**. This overspend is funded within the Education Non-DSG budget.

|  |  |  |  |
| --- | --- | --- | --- |
| Education Functions | Budget£’000 | ForecastOutturn£’000 | Variance£’000 |
| Education Welfare | 1,170 | 1,151 | (19) |
| Strategic Management | 1,577 | 1,657 | 80 |
| Asset Management – all schools | 333 | 333 | 0 |
| Asset Management – maintained schools | 344 | 344 | 0 |
| Statutory Duties | 1,865 | 1,880 | 15 |
| Total | **5,289** | **5,365** | **76** |

4.10 Key variations (above **£75,000**) are described below.

4.11 The overspend for Strategic Management (**£80,000**) reflects the ongoing effects of the pandemic and the need to provide additional resources to support the school system.

**5 Other Resource Implications**

**6. Consultation with stakeholders**

**7. Background / Supporting papers.**

7.1 Annex A – Schools Budget Draft Outturn 2021/22

 Annex A



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| Schools Forum | **Agenda Item 11** |
| Date: 18 May 2022 |  |

**REPORT TITLE: CONSULTATION RESPONSE TO COMPLETING THE REFORMS TO THE NATIONAL FUNDING FORMULA**

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 Government’s response to the consultation on ‘Completing the Reforms to the National Funding Formula’.

**2. Recommendations**

2.1 To note the Government’s response.

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

3.1 There are no specific School Forum powers or responsibilities in relation to DfE Consultation, however the usual powers and responsibilities for the wider funding implications remain.

###### 4. Background

4.1 The DfE held a consultation between 6 July 2021 and 30 September 2021 on the proposed changes to complete the reforms to school funding and move to a “direct” School National Funding Formula (NFF).

4.2 The DfE published its response to the consultation on 28March 2022.

**Gradual Approach to Transition**

4.3 The consultation recognised implementation of the direct NFF represents a significant change that requires a careful transition to avoid any unnecessary or unexpected disruption to schools.

4.4 The consultation responses underlined that the move to a direct NFF will be complex, and that a careful and measured approach to transition should be taken.

4.5 The DfE plan to transition to the direct NFF by bringing those LAs whose local formulae do not mirror the NFF progressively closer to the NFF over time.

4.6 For 2023/24 the DfE will require:

* Local authorities to use all, and only, NFF factors in their local formulae
* All local formulae factors to move at least 10% closer to the NFF, except where local formulae are already “mirroring” the NFF.
* Local authorities to use the NFF definition for the English as an Additional Language (EAL) factor.

4.7 Flexibility over the sparsity factor methodology will remain in 2023/24.

4.8 The approach to transition in subsequent years will depend upon the impact in the first year.

4.9 Mirroring the NFF means that each of a local authority’s local formula factor values are within 1% of the NFF’s value.

4.10 The impact for Essex of the 2023/24 requirements is that the primary lump sum is the only factor not mirroring NFF. Based on the consultation with schools it will mirror the NFF value in 2023/24.

**Developing the Schools NFF**

4.11 The consultation included proposals for how specific aspects of the current funding system would need to be changed and developed to move to the direct NFF.

4.12 This included developing the Schools NFF to allocate premises costs on a formulaic basis and a better approach to funding schools seeing significant growth in pupil numbers or falling rolls.

4.13 Over the coming year the DfE will:

* Consult on the approach to the split sites factor and to the PFI factor in the NFF
* In the second stage consultation, include proposals for the revised growth and falling rolls factor, including some options which would allow a degree of local flexibility.
* In the second stage consultation, include proposals for an exceptional circumstances factor.

 **Approach to Central School Services**

4.14 The consultation proposed to review how the funding operated to ensure greater transparency and to reflect the changing roles in a trust led system. The proposal included moving funding from the Central School Services Block (CSSB) to the Local Government Funding System (LGFS).

4.15 The common issued raised was moving funding from CSSB to LGFS with the highest response concerned over reduced transparency and the prospect of less funding being directed to education services as funding would likely be directed towards other pressures within local authorities.

4.16 The DfE’s response is:

* Review the services funded through the ongoing responsibilities element of CSSB aligned to the Schools White Paper.
* Ongoing services will continue to be funded through central Government funding.
* For central services delivered on behalf of schools, local authorities will continue to have flexibilities to de-delegate funding from maintained schools and MATs will have the ability to continue to top-slice academy funding.
* The DfE recognise the concerns raised around the transparency of MAT top-slices and will examine changes to improve and standardise this process.
* The second stage consultation will include further details on how the DfE expect the process of de-delegation to continue.

 **Approach to a Consistent Funding Year**

4.17 The consultation sought to understand the appetite for a change in funding year for maintained schools from a financial year to an academic year.

4.18 There was a mixed response to this question so the DfE has decided not to prioritise this policy development as they proceed to the direct NFF.

 **Schools Forum**

4.19 Whilst the move to a direct NFF will change the role of schools forums they will continue to play an important part in local decision making and stakeholder engagement. The existing roles in relation to early years funding and de-delegation will remain and the DfE plan to review how schools forums engage with high needs funding issues, following the SEND Review.

**5. Financial Implications**

5.1 Potential financial implications remain for the Authority on the funding of central school services.

**6. Other Resource Implications**

**7. Consultation with stakeholders**

**8. Background / Supporting papers.**

8.1 Full consultation response - [Fair school funding for all: completing our reforms to the National Funding Formula - GOV.UK (www.gov.uk)](https://www.gov.uk/government/consultations/fair-school-funding-for-all-completing-our-reforms-to-the-national-funding-formula?utm_medium=email&utm_campaign=govuk-notifications-topic&utm_source=7ccfeba2-9ecb-47d8-a059-5b4d6538f5c8&utm_content=immediately)

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 12** |
| Date: 18 May 2022 |  |

**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 note the arrangements for how meetings will be held at 3.1.
	2. To note that no changes are required to the constitution of Schools Forum at 3.5 and 3.7.
	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. Meetings will be held as follows:

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

3.2 All sub-group meetings will be held remotely.

3.3 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** |

3.4 T able 2 shows the ratio of pupils between primary and secondary schools as at the January Census 2022.

|  |  |  |
| --- | --- | --- |
|  | Pupils | Ratio |
| Primary | 118,179 | 1.47 |
| Secondary | 80,126 | 1.00 |

3.5 The ratio between primary and secondary pupils is 1.47:1 which requires no change to the number of primary and secondary representatives.

3.6 Table 3 shows a breakdown of pupils for primary and secondary between maintained schools and academies as at the January Census 2022.

|  |  |  |  |
| --- | --- | --- | --- |
|  | No. of Schools | Pupils | % Split |
| PrimaryMaintainedAcademiesTotal Primary | 222228**450** | 55,05463,125**118,179** | 46.6%53.4%**100%** |
| SecondaryMaintainedAcademiesTotal Secondary | 477**81** | 3,80876,318**80,126** | 4.8%95.2%**100%** |

3.7 The above primary pupil split in Table 3 between maintained schools and academies still requires 5 maintained members and 5 academy members.

3.8 A full list of members is shown at Annex A. It can be seen that there are two vacancies, one for a primary academy governor and the other for a secondary academy governor. The Authority is struggling to fill both vacancies but has recently advertised the vacancies again in Education Essex. Should the vacancies remain vacant at the end of the current election process, options will be brought to July’s meeting to ensure the vacancies are filled.

3.9 Table 4 shows the members who are coming to the end of their current term of office.

|  |  |
| --- | --- |
| Name |  Last Meeting |
| Harriet Phelps-Knights | 18th May 2022 |
| Nigel Hill | 30th November 2022 |
| Sean Moriarty | 30th November 2022 |
| Richard Green | 30th November 2022 |
| Mark Farmer | 30th November 2022 |

3.10 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 (May 2022)**

 **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 Nicholls | 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 2018 to November 2022 |
| 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 2018 to November 2022 |

**Special School Headteachers**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Simon Wall | Lexden Springs | May 2019 to May 2023 |

**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** |
| Vacant |  |  |
| Rod Lane (Chair) | Howbridge Junior School | January 2019 to January 2023 |
| Harriet Phelps-Knights | Janet Duke Primary School | May 2018 to May 2022 |
| Richard Green | Grove Wood Primary School | November 2018 to November 2022 |
| John Hunter | Felmore Primary | September 2019 to September 2023 |

**Secondary**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Ruth Bird | The Chelmsford Learning Partnership | January 2019 to January 2023 |
| Vacant |  |  |
| Carole Herman | Shenfield High School | November 2019 to November 2023 |
| Paul Banks | Chelmsford Learning Partnership | November 2020 to November 2024 |
| Lyn Wright | Sigma Trust | November 2020 to November 2024 |
| Mark Farmer | Bridge Academy Trust | November 2018 to November 2022 |

**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 2019 to July 2023 |

**Non-School Members**

|  |  |  |
| --- | --- | --- |
| **Name** | **Representation** | **Term of Membership** |
| Jeff Fair (Vice-Chair) | Teaching Unions Rep | January 2022 to January 2026 |
| John Revill | 16-19 teaching institutions | November 2019 to November 2023 |
| Suthan Santhaguru | Anglican Church Rep | November 2020 to November 2024 |
| 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**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **6th Oct 2021** | **24th** **Nov****2021** | **12th** **Jan****2022** | **21st** **Apr****2022** | **% Attendance** | **% Attendance incl. Sub** |
| Rod Lane (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 | Yes | Yes | 100 | 100 |
| Jinnie Nichols | Yes | Yes | Sub | Yes | 75 | 100 |
| Nigel Hill | Yes | Yes | Yes | Yes | 100 | 100 |
| Claire Styles | Yes | Yes | Yes | Yes | 100 | 100 |
| Sean Moriarty | Yes | Yes | Yes | No | 75 | 75 |
| Simon Wall | Yes | Yes | Yes | Yes | 100 | 100 |
| Jo Barak | Yes | Yes | Yes | No | 75 | 75 |
| Debs Watson | Yes | Yes | Yes | Yes | 100 | 100 |
| Harriet Phelps-Knights | Yes | Yes | Yes | Yes | 100 | 100 |
| Richard Green | Yes | Yes | Yes | Yes | 100 | 100 |
| John Hunter | Yes | Yes | No | Sub | 50 | 75 |
| Ruth Bird | Yes | Yes | Yes | Yes | 100 | 100 |
| Carole Herman | Yes | Yes | Yes | Yes | 100 | 100 |
| Paul Banks | Yes | Sub | Sub | Yes | 50 | 100 |
| Lyn Wright | Yes | Yes | Yes | Yes | 100 | 100 |
| Mark Farmer | Yes | Yes | Yes | Yes | 100 | 100 |
| Ruth Sturdy | Yes | Yes | Yes | Yes | 100 | 100 |
| Philomena Cozens | Yes | Yes | Yes | Yes | 100 | 100 |
| John Revill | Yes | Yes | No | Yes | 75 | 75 |
| Chanel Lassman |  |  |  |  | N/A | N/A |
| Marilyn Smith | Yes | Yes | Yes | Yes | 100 | 100 |
| Suthan Santhaguru |  |  |  | No | 0 | 0 |
| Jo Santinelli | No | Yes | No | Yes | 50 | 50 |

**High Needs Review Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **20th Oct 2021** | **8th Dec 2021** | **31st Mar 2022** | **26th Apr****2022** | **% Attendance** |
| Jeff Fair (Chair) | Yes | Yes | Yes | Yes | 100 |
| Rod Lane | Yes | Yes | Yes | Yes | 100 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 |
| Luke Bulpett | Yes | Yes | Yes | No | 75 |
| Harriet Phelps-Knights | Yes | Yes | Yes | Yes | 100 |
| John Hunter | Yes | Yes | Yes | Yes | 100 |
| Pam Langmead | Yes | Yes | Yes | No | 75 |
| Ruth Bird | Yes | Yes | Yes | Yes | 100 |
| Simon Thompson | Yes | Yes | Yes | No | 75 |
| Ruth Sturdy | No | No | Yes | Yes | 50 |
| Simon Wall | Yes | Yes | Yes | Yes | 100 |
| Emily Welton | No | Yes | Yes | Yes | 75 |
| Philomena Cozens | Yes | No | Yes | Yes | 75 |
| Jo Barak | Yes | No | Yes | Yes | 75 |
| John Revill | No | Yes | No | Yes | 50 |

**Finance Review Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **8th Dec 2021** | **22nd Feb 2022** | **23rd Mar 2022** | **26th Apr 2022** | **% Attendance** |
| Jeff Fair (Chair) | Yes | Yes | Yes | Yes | 100 |
| Rod Lane | Yes | Yes | Yes | Yes | 100 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 |
| Richard Green | Yes | Yes | No | No | 50 |
| Harriet Phelps-Knights | Yes | Yes | Yes | Yes | 100 |
| John Hunter | Yes | Yes | Yes | Yes | 100 |
| Nigel Hill | Yes | Yes | Yes | Yes | 100 |
| Pam Langmead | Yes | Yes | Yes | Yes | 100 |
| Ruth Bird | Yes | Yes | Yes | Yes | 100 |
| Sean Moriarty | Yes | Yes | Yes | Yes | 100 |
| Simon Thompson | Yes | Yes | Yes | No | 75 |

**Early Years Sub-Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **10th June 2021** | **16th Sept 2021** | **16th Dec 2021** | **21st Apr****2022** | **% Attendance** |
| Carla Deluca (Chair to 10th June) | Yes | No | No | No | 25 |
| Laura Grant (Chair from 16 Sep) | Yes | Yes | No | No | 50 |
| Chanel Lassman (Chair from 21st April) | Yes | Yes | No | Yes | 75 |
| Rod Lane | Yes | Yes | Yes | Yes | 100 |
| Ashley Wilson | No | Yes | No | Yes | 50 |
| Ruth Edwards | No | Yes | No | Yes | 50 |
| Samantha Cottrill | No | No | No | Yes | 25 |
| Lisa Foyster | Yes | No | Yes | Yes | 75 |
| Anthonia Fasae | Yes | Yes | No | No | 50 |
| Maggie Catmull | Yes | Yes | No | Yes | 75 |
| Emma Hudson | Yes | No | Yes | Yes | 75 |
| Kim Barnetson | No | Yes | Yes | No | 50 |
| Debs Watson | Yes | No |  |  | 50 |
| Helen Taylor | No | No | Yes | Yes | 50 |
| Jennie Heath | Yes | No | Yes | Yes | 75 |
| Angie Owen | Yes | No | No | Yes | 50 |
| Rhiannon Dyson | Yes | No | No | No | 25 |
| Terri Ewer | Yes | No | Yes | No | 50 |
| Jo Gridley | Yes | Yes | No | No | 50 |
| Elaine Crust | Yes | Yes | Yes | No | 75 |
| Denise Linton | Yes | Yes | Yes | No | 75 |
| Alexandra Wilkins | Yes | No | No | No | 25 |
| Claire Chapman | Yes | No | No | Yes | 100 |
| Tracey Morrison | Yes | No | No | Yes | 50 |
|  | **10th June 2021** | **16th Sept 2021** | **16th Dec 2021** | **21st Apr****2022** | **% Attendance** |
| Stef Montgomery | Yes | No | No | No | 25 |
| Annalei Smith |  |  | Yes | Yes | 100 |
| Lisa Rozee |  |  | Yes | Yes | 100 |
| Linda Reynolds |  |  | Yes | Yes | 100 |
| Helen Hill |  |  |  |  | 100 |
| Beverley Middleton |  | Yes | No | Yes | 100 |
| Jenny Gregory |  | Yes | No | Yes | 100 |
| Lauren Pinchbeck |  | Yes | No | No | 50 |
| Titilola Fowowe |  | Yes | No | No | 50 |
| Katherine Waite |  |  |  | Yes | 100 |
| Jessica Carly |  |  |  | Yes | 100 |
| Christine Chaffe |  |  |  | Yes | 100 |
| Gaynor Baker |  |  |  | Yes | 100 |
| Kelly Stallwood |  |  |  | Yes | 100 |
| Zoe Orr |  |  |  | Yes | 100 |
| Tina Carnegie- Dielhenn |  |  |  | Yes | 100 |
| Sophie Edevane |  |  |  | Yes | 100 |
| Ferliene Willis |  |  | No | Yes | 50 |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 13** |
| Date: 18 May 2022 |  |

**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 (SEN, Early Years, Formula Review) |

|  |  |
| --- | --- |
| **Date of Schools Forum** | **Agenda Items** |
| Wednesday 13th July 2022 | School and Academy Balances (I) |
|  | Schools Budget and Education Functions Q1 Update 2022/23 (I) |
|  | SEMH Primary Provision (D) |
|  | SEND and PRU Capital Investment Project (D / I) |
|  |  |
| Wednesday 28th September 2022 | Half Year Budget & Education Functions Update 2022/23 (I) |
|  | Scheme for Financing Schools (D) |
|  | High Needs Funding 2023/24 (I) |
|  | School Funding 2023/24 (D) |
|  | High Needs Funding Review (I) |
|  | De-Delegation 2023/24 (D) |
|  |  |
| Wednesday 30th November 2022 | Early Years and Childcare Update (I) |
|  | School Funding Consultation Final Proposal (D) |
|  | Scheme for Financing Schools (D/I) |
|  | High Needs Funding Review (I) |
|  | SEND and PRU Capital Investment Project (D/I) |
|  | Constitution and Membership of Schools Forum (D / I) |
|  |  |
| Wednesday 11th January 2023 | Third Quarter Budget & Education Functions 2022/23 Update (I) |
|  | 2023/24 DSG Budget (D) |
|  | Election Chair / Vice Chair (D) |
|  | High Needs Funding Review (D/I) |
|  | SEND and PRU Capital Investment Project (D/I) |
|  |  |
| Wednesday 17th May 2023 | Falling Rolls Fund (D/I) |
|  | Schools Budget & Education Functions Draft Outturn Report 2021/22 (I) |
|  | High Needs Funding Review (I) |
|  | SEND and PRU Capital Investment Project (D / I) |
|  | Constitution and Membership of Schools Forum (D /I) |
|  | Early Years and Childcare Update (I) |