**Schools Forum Meeting Minutes of 17th May 2023**

**held at Chelmsford City Racecourse, CM3 1QP.**

**8.30 – 11.24**

*Approved 12 July 2023*

In Attendance

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| Ruth Bird (RB) - Chair | Jo Barak (JB) | Luke Bulpett (LB) |
| Jeff Fair (JF) | Carole Herman (CH) | Marilyn Smith (MS) |
| Sean Moriarty (SM) | Debs Watson (DW) | Chanel Lassman (CL) |
| John Hunter (JH) | Sue Bardetti (SB) | Stuart Roberts (SR) |
| Rod Lane (RL) | Harriet Phelps-Knights (HP-K) | Robin Taverner (RT) |
| Richard Potter (RP) | Jinnie Nichols (JN) | Lyn Wright (LW) |
| Nigel Hill (NH) | Claire Styles (CS) | Jody Gee (JG) |
| Ruth Sturdy (RS) | Emily Welton (EW) |  |
| **LA Officers** |  |  |
| Yannick Stupples-Whyley (YSW) | Andrew Page (AP) | Clare Kershaw (CK) |
| Cllr Tony Ball (TB) | Carolyn Terry (CT) | Ralph Holloway (RH) |
| Val Cleare (VC) - Minutes |  |  |

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| **1** | **Apologies for Absence and substitute notices**Ruth Bird chaired the meeting and welcomed everyone. Richard Potter was welcomed back. He has re-joined as a primary academy headteacher representative.Apologies had been received fromPam Langmead, Philomena Cozens, Chanel Lassman, Jo Santinelli, James Saunders, Bowak Scott, Simon Wall. |
| **2** | **Early Years Update (Carolyn Terry)**CT updated Forum on the draft outturn position of the Early Years Block for 2022/23, outlined the proposals for utilising **£1.9 million** of the surplus balance and sought approval to consult with the sector on allocating the funding for the former teacher’s pay and pension grants.Section 4 highlighted take-up for funding places. The take-up of the two-year-old FEEE during the Spring term was 3,011 which was 87% of the eligible two-year-olds in the county. The take-up of the universal three- and four-year-old FEEE at the Spring term 2023 headcount was 33,586, which 97.3% of the eligible three- and four-year-olds. This remains above the national take up of 92.3%.Section 5, Table 2 set out the analysis of the financial position of the draft outturn for 2022/23. The reason for an underspend is that children are not taking as much as forecast to. Table 3 set out the surplus position of **£7.4** **million**. There are proposals to spend £1.9 million of that surplus. If those proposals are agreed, it will leave a surplus balance of **£3.9 million**. This will be held until the Authority knows the outcome of the final adjustment to the 2022/23 allocation which is due in July.5.4 set out additional resources to support the sector, practical support and some support for parents. It is proposed to temporary increase over 2 years 1fte across the sector helping providers with sustainability and setting up business models to be successful and capacity around children’s team. Items 2 and 3 are contributions towards the Year of Reading and the Year of Numeracy. Item 4 is practical support to invest in Speech and Language. It is for online support whereby settings can access aimed at those children at a low level with language delay to take early action to help those children with their language. There is a focus in 6 levelling up areas funding 42 settings reaching 500 children. We would want to recommend if year one is successful to continue for two more years to allow to continue. Sustainability and Sufficiency – ECC has identified settings in most disadvantaged areas, that is if there is no other childcare offer, to access their funded place. It needs to be a targeted offer, but business management would bring applications based on criteria. Investment for support for parents. This is talk, listen and cuddle campaign which is a resource for children focusing on families on early language and communication. This is to improve the offer and reach more, and the investment is to make more impact in that way. 5.5 A summary paper regarding a request to undertake consultation on changes to the Early Years Block Teachers Pay and Pension Grants implemented from April 2023 was taken to the Finance Review Group on 25 April 2023. This is with the recommendation that the funding should be used for the purpose originally intended. This will be brought back to Forum in July for final decision.5.6 was an update on the new SEN Inclusion funding proposals progress and how ECC offer funding across the areas. The funding includes banding descriptors and merging current two streams into one funding source. Update taken to the High Needs Block to continue the work. There will be engagement sessions; the first one is today. Further updates will be brought to the Forum and go live from September 2024. Also looking at formalising transition arrangements from an Early Years setting into a reception class and how funding works. This new process is to encourage early planning between EY settings, schools and parents. Section 6 was on the budget and Childcare Reforms update announced. ECC is concerned about a lot of areas and a deep dive analysis has been done. ECC is awaiting guidance from the DfE and implemented in April next year. Early Years are concerned about the capacity to deliver and parents expectations, and what is actually going to be delivered. The Schools Forum Early Years and Childcare Reference Group continues to meet. The key areas of discussion have been Early Years children with emerging additional needs and funding levels not meeting the actual cost of providing a funded place for eligible 2-year olds and 3 and 4 year olds which is further impacting the financial pressures on the economy. Also, regarding the recruitment and retention of qualified staff, ECC is looking at what action can be taken to support settings. **Questions**RP stated 6.3 was really detailed.RP asked about volatility going forward and reinforcing. Has there been a study of performance rate against income over the next 5-10 years?CT responded that funding comes from the DfE. if there are more children, funding increases, or if there are less children funding reduces. ECC is funded at one level and calculate hourly rates based on forecast and census data. If children are not at settings at the January Census, ECC receives less funding. There has been a real push this year to make sure all the children are in the settings on Census day to claim funding. CK stated there is a sufficiency plan which works alongside, and looks at what is needed. There is a gap there. CT indicated there is a five-year plan, including Section 106 funded places. RL referred to 5.4 and asked can Forum have a cost benefit analysis for impact? CT agreed. If proposals are agreed, an evaluation section will be included and reported to Forum. SM observed there are a lot of proposals today including a £3 million and £1 million contingency. Have you got another list of proposals to be considered in July or after? Is there a logical link?CT responded these are the proposals ECC wants to bring right now. More needs to understood about the childcare reforms and impact. Proposals around how having capacity around that. The DfE has more resources to implement but have not advised of this yet. ECC wants to set up a cycle, to passport funding so everyone gets a proportionate amount. CK added, it is great investment in the sector and is innovative moving forward but is the investment self-sustaining all the sector which is the biggest concern. CK felt this is the right approach about the volatility and the reforms going forward and not funded. SB stated it is crucial to put investment in at the beginning. CT stated that ECC is about to start a recruitment and retention drive.RL informed as Chair of Schools Forum he has been a member of the Early Years Sub Group. Whilst no longer Chair of Forum Rod is willing to continue this. It was agreed that RL continues on this group and keep RB up-to-date and will share minutes. **Recommendations**:The Forum noted the draft outturn for 2022/23 at 5.1The Forum agreed unanimously the proposal to allocate **£1.9 million** of the Early Years Block surplus balance set out at 5.4.The Forum agreed unanimously to undertake a consultation on how to apply the former teacher’s pay and pension grants set out at 5.5.**Action – CT to produce a cost benefit analysis of carry forward proposals** |
| **3.** | **Falling Rolls Fund (Yannick Stupples-Whyley)**YSW outlined the proposed balance criteria to be added to the Falling Rolls Fund criteria and proposed the schools to be funded from the fund.**JN declared an interest in this Agenda item.****RP declared an interest in this Agenda item.**Section 4, 11/1/23 the Schools Forum had approved the revised criteria for the Falling Rolls Fund. A further criteria had been agreed to prevent schools with large balances benefitting from the Falling Rolls Fund. 4.2 proposal is effectively seeking the balance to be less than or equivalent to 8%, except for secondary schools which will be 5% of the relevant budget share. This will be reviewed on an annual basis. 4.4 The Authority contacted all schools that met the mandatory Ofsted rating and the Falling Rolls criteria. Table 3 showed the schools that were contacted and those that have made a subsequent application. It was noted that Finchingfield Primary has submitted an application and that will come to the next Schools Forum. 4.6 showed schools recommending approval and going into the Falling Rolls Fund. There are two schools, Doddinghurst Infant and Wimbish Primary who meet all criteria except the proposed balances criteria. The growth predicted by each school has been checked with the School Organisation Team who agree the growth forecast for each school. Table 5 showed schools recommended funding of a total of **£542,000**. The budget is insufficient for the applications recommended for approval. Within Agenda Item 10 there is a surplus balance in the Schools Block. It is proposed to use **£76,000** of the Schools Block surplus to increase the budget for the Falling Rolls Fund. YSW explained Annex A – School Applications.The first table is sent out to schools. The next table is cut out of the 10-year plan and shows schools in the planning group, places and surplus places over the next 10 years. Funding is based on pupil forecasts provided by the school. Although forecasts indicate there will be a significant surplus of places in the Reception cohort for the next two or three years, it is expected these cohorts to increase in size, as they move through primary school, due to additional housing being built in the area. Regarding confirmed housing is going up in the area, RP does not think this is happening.YSW informed Prettygate Infants and the Pupil Place Planning Team have confirmed this. JF indicated we did look at that in detail to make sure what we have been asked to fund was appropriate.YSW referred to The Alderton Junior School that from October 2023 the school is reducing to a PAN of 60, therefore we are proposing it is funded to a PAN of 60 rather than PAN of 90.**Questions**SM asked what has happened to St Andrews Church of England Voluntary Controlled Primary School.YSW confirmed they have submitted an application and it did not quite meet the criteria. The school has been contacted and invited to have another look but they have not come back.SR asked is there any indication how many more schools will be liable once Ofsted rating is removed?YSW responded of the Falling Roll criteria, there are two.CK believed this might change moving forward as additional checks are built into the system.CH stated both primary schools will meet the criteria once it has been removed. **Recommendations**:The Forum approved unanimously the balances criteria at 4.2 as recommended by the Finance Review Group (FRG).The Forum approved unanimously the recommendation of FRG to fund the schools listed at 4.6 to be funded by the Falling Rolls Fund for the amounts shown at 5.2 for 2023/24.The Forum approved unanimously using **£76,000** of the Schools Block surplus balance to increase the budget for the Falling Rolls Fund at 5.3. |
| **4.** | **School and Academy Balances (Yannick Stupples-Whyley)**YSW updated Forum on the total balance position for all Essex schools and proposed to recommence the review of schools with balances in excess of 30% of their funding.YSW referred to Table 4 which showed £176.9 million compared to last year. Table 1 showed breakdown across each of the phases.Table 2 showed the movement in balances for maintained schools has decreased by **£5.1 million**.4.7, Table showed for maintained schools the number of schools in surplus or deficit.The Table showed there are 12 maintained schools in deficit at 31st March 2023, which is an increase of 9 schools compared to 2021/22.Table 7 showed there are 18 academies in deficit, which is an increase of 2 schools since 2020/21.The next set of tables looked at the breakdown of schools percentage balances or deficits. 5.3 The number of primary schools with balances above 30% has increased from 48 schools to 56 schools (12.6%).Table 9 showed for secondary schools a breakdown of the percentage of balances held with a comparison to the previous year. It was noted the FRG have undertaken a review with balances in excess of 30%. **Questions**SR asked has the DfE got any plans to challenge 60% and above?YSW was not aware of anything. If maintained schools there would be a balances clawback. The DfE would be aware through the reports they collect. It could be difficult for the DfE to argue this.CK said it was important with the deep dive. They have not taken into account winter fuel and inflationary pressures. If applied to academy balances there will be £140+ million in balances. There needs more nuance and to know what is going on.JB queried Table 5.RP stated larger academies have SCA funding. It was suggested it should be 30% over a period of time.YSW pointed out on Table 5 it showed the same analysis as Table 3 for academies including trust’s central services balances.JF indicated Forum are trying to put ourselves in the place of politicians that schools are extremely well funded and not issues at all, but in my experience, they talked about statistics yesterday, fully funded it and if it does not pan out politicians do not look at this. We need to give Cllr Ball information. There are financial defects in schools, but the balances do not show this.CK responded ECC will look at a 5 year projection and what is going on, and take the 56 schools and build that into the deep dive. RL asked is there any information about plans in other Local Authorities? YSW stated ECC can look for maintained balances but not every Local Authority looks at academy balances.SM responded that it was mentioned 65 primary schools and 6 secondary schools.YSW clarified it is 4 PRU’s. **Recommendations**:The Forum noted the report.The Forum approved the recommendation of the Finance Review Group (FRG) to reconvene the review of schools with balances of 30% or higher. |
| **5.** | **Constitution and Membership of Schools Forum (Yannick Stupples-Whyley)**YSW updated Forum of the constitution of Schools Forum. YSW also updates on the membership of the Forum and members attendance at meetings.YSW suggested under Item 3.2 an amendment. It is now proposed in-person meetings for May and September. Table 1 showed a total of 28 members.Table 2 showed the breakdown from the January census 2023 of the ratio of pupils between primary and secondary schools of 1.44:1 which requires no change to the number of primary and secondary representatives.Table 3 showed breakdown of pupils for primary and secondary between maintained schools and academies as at the January census 2023. No change to secondary representative. Table 4 showed the members who are coming to the end of their current term of office:Simon Wall 17 May 2023John Hunter 27 September 2023Philomena Cozens 12 July 2023RB asked if any of the above wish to re-stand to advise accordingly.Annex A – Schools Forum Membership – posts are full and no vacancies.Annex B – showed Schools Forum Attendance.**Schools Forum Attendance**In terms of membership – need to address about Suthan Santhaguru who has not attended any meetings.**Action**: ECC will write to the Diocese to seek an alternative representative. RL enquired if there is a Director of Education in the Diocese?CK believed there has been an appointment of a Director of Education in the Diocese.**Recommendations**:The Forum approved to change the meeting arrangements switching the in-person meeting from January to May at 3.2.The Forum noted that no changes are required to the constitution of Schools Forum at 3.6 and 3.8.The Forum noted Membership at Annex A and Attendance at Annex B. |
| **6.** | **Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies.****ASHE**With regards to academy balances, CH indicated there are huge issues in schools around budgets. There are concerns around energy. However, there are major concerns regarding recruitment and retention. There have been huge issues in all subjects as came to 31st March 2023 deadline. CH particularly mentioned because of budget implications, issues post pandemic, huge changes in behaviour issues, many more applications for SEN assessments and associated with that there are capacity issues at all levels. Many discussions among ASHE headteachers are at a stage where there is no alternative to permanently exclude young people, and yet not sufficient for them to be appropriately supported. It is a perfect storm that schools are struggling to find our way out of. Those are particular issues exacerbating headteachers at the moment about funding and capacity and funding for expertise such as alternative provision, if can attract the right staff.**EPHA**HPK reported on the usual financial pressures for primary schools including:* energy price increase – this varies considerably from school to school, depending on what contract has been agreed; some schools have been pleasantly surprised and others still struggling to balance the books.
* unfunded pay awards – including the impact of the 32 ½ hour week from September.
* other inflationary pressures, including the rising price of food, consumables and transport has inevitably impacted on the school’s expenditure and also families’ ability to pay for trips etc which is then having an impact on school finances or learning opportunities.

Many schools are now having to use their contingency/ carry forward to set the budget, as discussed previously, the reason they have such large carry forwards as this was anticipated and many schools concerned about what the next 3 to 5 years will look like financially.Schools continue to struggle with supporting SEN/ SEMH, and many have reported that there is often a lag in funding and often schools don’t know if/when they will receive top-up funding/IPRA funding etc.Recruitment and retention of support staff continues to be a problem, putting more pressure on the system, in particular in those supporting SEN. And the cost implications for schools when funding is slow to be released.A positive EPHA continues to support schools including offering free training, for both headteachers and governors – there has been an excellent take-up of recent training on managing exclusions (around 240 headteachers trained, and 250 governors so far). EPHA were pleased that the education access team were able to attend the training sessions and offer the Essex perspective.**ESSET**RB commented on the excellent training mentioned above. RB informed of similar issues already reported. In addition, special schools’ sector first wave of re-banding of the system. ESSET is working closely with the Local Authority and are confident going forward. There is the complexity of needs for more complex children. The recruiting of specialist staff has been a challenge, too. schools are seeing enhanced behaviour, but it is the complex needs and looking a training our staff to deal with this. One of the concerns is about parental engagement and assessments being completed. Rather than parents having improved confidence in the system, they have decreased confidence, they are incredibly anxious and disengaged. One of the challenges in the special schools’ sector is the capacity within Local Authority teams around plans being amended, and ensuring accuracy is really important. Outreach again to take forward to look at further with Ralph Holloway to support the whole school sector.**PRUs**Additional pressures in referrals due to the Local Authority holding high level of permanent exclusions. More capacity in the summer term when year 11’s leave, which will help with capacity issues. PRUs are keen to work with other schools in driving Outreach model software. PRUs have the same issues with recruitment and retention, and funding issues around energy costs, even energy efficient building costs are higher than old, dilapidated buildings.**Early Years – Nurseries**CT had summed up everything the early years sector is facing and everything else others have said. DW agreed it has been a most challenging time. The nursery school has seen changes in Children & Families. Covid has made what was coming happen sooner. It is a worry moving forward, funding for children at an earlier point in first 5 years and put in right support at the right time. A lot of school family members have listened to us. The worry is the list that CT has given you is not all about money; it is about children and their families before they get into education and worried about reforms. Parents are being deskilled; they are handing over their children and education settings are then having to pick up what is not in place for those children. Every parent who comes through our door and the Local Authority is working really hard to put in the support. There is lot of work with CT, speech and language and trying to feed back to families. Children are just not ready, but settings have done the best they can, but the pressures coming down on you and the children, and the pressures on parents, without that support in place, money, health and there are 800 children on speech and language waiting list. Tanglewood is just one maintained school. We are talking about children being excluded now. Three children will not make it with a good transition. With good support and working with SENCO’s, schools are trying to put everything in place. It is about these children and behaviours. DW has not seen the needs coming through; Covid has just exacerbated this. The DfE needs to change, and other people need to change to recognise these children need more than sitting to do examinations, but DW is worried what settings are seeing coming through Early Years. It is not about recruitment, a better paid job, it is about children who are punching you on the head, are not toilet trained. Parents have similar needs and need support. It is not just about money.**ESGA**RL asked has ECC encouraged our universities to develop the therapies we are all so short of and what impact this may have in the future? Those schools in a role with the National Governing Association recommend headteachers look at a recent survey because it is very detailed and will impact on the NGA’s next approach to governing. RB reported ESGA is working with secondary schools. In July it is planned to have a 6th form conference at Anglia Ruskin University (ARU) and as part of that ESGA want to build Governors for the future because of the shortage. The working party has received a £10k grant to putting that on at the ARU and they are giving their buildings free to hold this event. ESGA have said the conference has to have an element of school governance. With regards to fuel prices especially for oil one of our members has written to Cllr Ball.CS spoke about school partnerships which has been for headteachers, and that has tied in with what Pam Langmead had been talking about exclusions and school boards, and experience to run exclusion panels because behavioural problems have increased. There is opportunity there to support Governors to extract more value from school partnerships that headteachers have done.**Unions**JF commented from teaching staff everyone has said it all. There is frustration with the Government, how you fully fund and take it from something else that was unbudgeted and no school resources. The Government is not able to engage with anyone. With regards to school retention, numbers do not stay in the provision which is not good news and creates pressure in the system. There is concern because of the way funding is dealing with redundancy because of insufficient staff in the system. Schools are in a long period of transition where so many services have been removed, and our members are expected to be Jack of all Trades which is an impossibility. It is about how this has impacted on members and on the schools. The unions are dealing with more cases supporting members who are suffering from behaviours that did not occur in the past. **Unison** MS agreed with what JF had said. There are concerns about Government funding along with staff recruitment and retention. There have been more reports from staff who are experiencing violence against them, and it is difficult to deal with. Unison is seeing new rounds of teacher redundancies.**Church Rep** None.**High Needs Review Sub-Group**JF reported HNRG has met. Further work to be undertaken on the high needs block surplus. CK added the delay has been caused by the banding work.**Finance Review Group** FRG has met and discussed Agenda Items 3 and 4.**Early Years Sub-Group** – EY has met and discussed Agenda Item 2.**Any Other Business**LB raised about teacher budgets. He described a scenario of a business manager goes and puts in £80k for fuel. Then there is the Government deliberating whether to give pay rises or not. You plan money for the future.LB understood how budgets look but it is consistently a concern schools have this, and then with whatever has happened you are left with a deficit. LW commented it was highlighted where Essex does not get identified. For example, in the email from the Local Authority this week announcing about recruitment and retention is that we are actually going to be in a very difficult position because the idea of teachers going to be able to reclaim their loan, Essex does not get this. It is going to make recruitment more difficult.CK indicated ECC has escalated this to the DfE. Essex is disadvantaged from a school funding perspective and HNB perspective because ECC IS diligent, using the money and able to make a degree of contingency to keep the system going. CK will challenge claim on student loans.**Action**: CK to challenge this with the DfE. |
| **7.** | **Minutes of 11th January 2023**The minutes of the last meeting were accepted as a true record. |
| **8.** | **Minutes Action Log – Yannick Stupples-Whyley**This related to an Early Years Update to bring proposals for allocating a surplus balance where **£1.9 million** was agreed, which leaves **£3.9 million** held until ECC receives the July update, then come back in September.  |
| **9.** | **High Needs Review (Ralph Holloway)**RH updated Schools Forum on the progress made towards theImplementation of the new SEN top-up funding system for Essex.RH gave an update on the banding and amended timeline for the financial element. Numbers were put in place for the next stage of moderation formainstream schools. Started this in Summer 2022 starting with specialschools and colleges. They have been moderated and introduced training to mainstream schools and they have been banded as well. Completedmoderation for special schools and did a second round of moderationwhich was completed end of Spring term. In special schools there are 3groups; there is one agreed banding; there is one minor work required on aparticular band; they are doing focus work on a band. Special schools there is more detailed work on Bands E, F and G.When making decisions about individual schools looking at individual bands, school colleagues moderated, agreed or disagreed and made the decision whether band to be accepted and looked at the profiles of the schools. ECC looked at a school that had children with severe learning in Clacton and also in Harlow. In addition to the individual school decisions, also looked at overall profile. When agreed all of the bands they will passed to YSW and the finance team who will calculate the band values, looking at Bands C to G in special schools.Colleges - One has been accepted. The other six are doing more detailedwork. There are challenges depending on information from previous setting. Moderation has commenced for mainstream schools. ECC looked at the average for secondary schools and average for primary schools and an analysis for every single school, how it is scored compared for primary, and likewise for secondary. The team has email headteachers asking them do they want to have another look at their banding. Other schools have decided to upgrade them.ECC has started the moderation process with primary schools. Instead of20 schools, there are 500. Moderation is commencing with smaller primary schools and effectively can do 10 schools in one meeting. It was valuable to have input and agreed on banding. It is starting slowly and those schools we need to look at again. There may be a second change which is optional. Mainstream and secondary schools – RH informed he has to add upeveryone in Bands 5 – 10 to get to children allocated by Band G inmainstream schools. Everything is still on course and is incrediblychallenging. Schools are to back up the evidence with the latest copy of the Education Healthcare Plan (EHCP) and other supporting information. The focus is on quality not quantity.Early Years has been more complicated. RH reported where focus hasbeen on new system for Early Years providers. Early Years banding descriptors framework has been developed for each function can be applied and transition funding for Early Years to reception class. Therefore, the new system should flow. It will be more sustainable, and the focus is on transition. The second change to the original offer for children with SEND (see page 14 Appendix 3 and numbers outturn on page 15. **Questions**JN asked how did you put the criteria together?RH stated you are being compared to all primary schools and is that schoollikely to have a different intake? ECC would rather be cautious at this stage and reject all the bands submitted.JN enquired what did RH mean by intake?RH said you are likely to have different children in your school rather than in a school in Uttlesford.RH went through the entire list of mainstream schools, looked a percentage average, sat down with quadrant. Some were obvious like you have not got a particular band. There were others which were more borderline. It is a challenging intake.JN wondered how the conclusion was reached. Maybe looking at ourEHCP’s and it has not been looked at for many years. JN was not surewhat information using.RH indicated it was about understanding the implicationsRH stated it was not an in depth look at the school.EW asked about transition funding model for those children Early Yearsmoving. How it differs? RH said it is a permanent funding stream and it is a more scientific way ofproviding funding.EW asked about additional funding for transition if that child does not havean EHCP.RP commented those schools that received the letter based on the knownscientific methodology given that there are children with EHCP’s can gofrom any setting to setting. Apparently, choice is not in terms of going toyour nearest setting. RP stated some headteachers may feel that the extrawork for them and their SENCO’s producing more evidence.RH reported schools have not been asked to re-band but to reconsider.RH said for Bands 7, 8, 9 and 10, he has; for Band G, RH has 216.RP indicated there is a line in the letter which asks us to return evidence bythe end of May. There are 11,000 children regarding individual moderation. RP highlighted the extra work from schools to underpin this process thatthey are having to do. Extra piece of work that individual settings are doingto underpin this process that this is occurring. There is a hidden cost ofperson hours.RH confirmed it was always clear ECC needed this evidence from schools. Most primary schools are asking for is six. Two people are downloading evidence for 11,000 children. RH appreciated the massive burden onschools. RH was apologetic there is a burden but without a rigorous approach the Local Authority may be in millions of pounds of debt.CK informed whilst working on current budget allocations for top up fundingif need to raise this with the High Needs Block, that has a knock-on effect. The other consideration is the need to revisit numbers if the current banding allocation of pupils is moved to the new banding allocation, can this befinancially afforded? If considering a small amount, it needs to be considered as well with confidence and certainty for robustness. ECC does notwant to devalue banding values and cause further problems down the line.RH stated the starting principle is to put money into this. It has to be moneythat is sustainable. The intention was no-one is a loser, everyone is awinner in 10 years’ time, not just in 2023.**Recommendations**:The Forum noted the progress made towards the implementation of the newSEN top-up funding system for Essex (3.1 to 3.4).The Forum noted the amended timeline for the introduction of the financialelement of the new banding system for colleges and special schools (3.5 to3.7).The Forum noted the strategic direction and principles required for theImplementation of the new banding system for Early Years providers (4.1 to 4.4).The Forum noted the methodology and timeline for the moderation ofbanding returns from mainstream schools and enhanced provisions (5.1).RH indicated he would like a High Needs Review meeting next month. This will be held on 20th June 2023.Is there other work concerning SEN running in parallel?RH will bring sufficiency plan to the next meeting and update on overallprogramme to the Forum in July. |
| **10.** | **Schools Budget and Education Functions Draft Outturn Report 2022/23 (Yannick Stupples-Whyley)**YSW updated Schools Forum on the draft outturn position for the year ended 31st March 2023 for both the Schools Budget and Education Functions.YSW stated the total Dedicated Schools Grant (DSG) received for 2022/23 after academy recoupment is **£557.1 million**. The DSG draft underspend for 2022/23 is **£17.6 million**. Table 2 showed the movement in the overall DSG balance between 1st April 2022 and 31st March 2023.YSW reported in terms of actual cost of the underspends, most are known to you. In the Schools Block ECC set aside **£1 million** of which **£355,000** has been allocated to schools. The remaining **£645,000** will be carried forward to 2023/24. The DfE has recalculated the growth fund allocation and funded an additional **£685,000** for summer term payments to academies. Central School Services Block has an underspend of **£900,000**. The change here has been around initial Teacher Grant. There has been a historic balance to carry over for a number of years and has never been required to be paid back. In terms of the High Needs Block, there is nothing new that has not been covered previously.**Education Functions** – previously approved in October 2021. Table 3 showed the approved services provided to all schools.Table 4 showed the total funding de-delegated from maintained schools in 2022/23.The budgets in Table 5 are subject to recoupment each time a school converts to an academy. To date there have been three academy conversions. Table 6 showed the draft outturn which is a **£14,000** overspend.**Recommendations**:The Forum noted the draft outturn position for the year ended 31st March 2023. |
| **11.** | **Implementing the Direct National Funding Formula – Consultation Response (Yannick Stupples-Whyley)**YSW updated Schools Forum on the Government’s response to the consultation on implementing the direct national funding formula (NFF).The first area was the interaction between High Needs and Schools Funding. The Local Authority will still be allowed to request transfer from the Schools Block and as part of that the Local Authority would have a selected menu; they would have to go to the DfE as to how they want that adjustment made. The DfE when moving to the NFF will include an indicative SEND budget.**Falling Rolls Fund**Going forward will look at schools and look at area falling roll to form a Falling Rolls Fund. From April 2024 the requirement will be removed to have an outstanding Ofsted. **Split Sites**Moving forward 2024/25 plan to introduce a national formula for split site funding and this would be based on eligibility and distance eligibility. The Government will allocate two-third of the available funding through the basic eligibility and one-third through the distance eligibility.**Exceptional Circumstances**The Government will continue to progress plans to reform exceptional circumstances. The threshold will remain at 1% for the time-being.**Minimum Funding Guarantee (MFG) under the Direct NFF**There was a majority favourable 84% favourable response. The Government will move to a simplified pupil-led funding protection.**Funding Cycle**In terms of helping schools plan, the Government was either going to implement indicative budgets or a calculator. They are introducing a calculator and will work with the Local Authority to advise school calculator plan. They also looked at data collection around de-delegation. They are wanting to determine when collecting the data, when academy converts come to each Local Authority and get the data. One data collection has been agreed each year in March.ECC expects that the provisional settlement will be announced in July and will bring an update to the September Forum.**Financial Implications**Table 1 showed the implication for each school based on the 2023/24 lump sum value. The split site national formula will have a negative impact on Essex schools in receipt of split site funding.**Recommendations**:The Forum noted the report. |
| **12.** | **Afghanistan Resettlement (Education) Grant 2022/23 (Yannick Stupples-Whyley)**YSW updated Schools Forum on the Afghanistan Resettlement (Education) Grant 2022/23.On 31/3/23 the Government gave guidance on how to allocate funding. They are basically matching as they did allocate out for the Ukrainian Grant. Essentially, ECC is receiving just over **£1 million**. Schools will receive **£1,000** per child for the Summer term. The Local Authority will retain the costs of home to school transport **(£225,000**). The remaining allocation will be held until know actual location of the pupils. CK informed ECC did not know this money was coming. The Home Office has now issued every family in the 3 hotels in North Weald with notice to move out but will no longer provide them with paid accommodation. (Also, in Marks Tey and Chelmsford hotels.) These children settled in a number of schools in Essex. There are not as many in the North Weald area. CK stated headteachers have been told that this is coming and it is difficult to plan as well. There are implications where these families move to. If not, do we provide transport (increase home to school transport)? CK was grateful to the Forum to agree funding into schools. We are putting some of this funding into schools for the Summer term but are keeping some of it back as the future is uncertain.**Recommendations**:The Forum noted the report. |
| **13.** | **Forward Plan – Yannick Stupples-Whyley**YSW read this out and confirmed the dates of future meetings up to May 2024.Early Years – if there is an announcement on the Early Years Settlement – expecting an August announcement.CT asked for the current year’s surplus to be discussed either in July or September.**Action**: YSW to discuss with CT.**Recommendation**The Forum noted the dates of future meetings and that additional items as proposed by Schools Forum are included in the Forward Plan. |
|  | **Any Other Business**Cllr Tony Ball mentioned today is Self-Numeracy Day which follows on from the Essex Year of Reading. We are taking the opportunity from lessons learned. We have Bobby Seagull from University Challenge and doing a programme on BBC Radio 4. Bobby Seagull is launching today Essex Year of Numbers. |
|  | **Chair’s Closing Comments** (Ruth Bird)Ruth thanked everyone for attending the meeting.**Date of next meeting – Wednesday, 12th July 2023 at 8.30 am**Via Teams**Note**: 27th September 2023 will be held in person at Hamptons Sports & Leisure, Beehive Lane, Chelmsford |