**Schools Forum Agenda**

Wednesday 27th November 2024, **Microsoft Teams**

From 8.20am for an **8.30am start**; break **10.05am** finish by **11.20am**

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

**Decision Papers**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 2 | Schools and High Needs Funding 2025/26 | Ralph Holloway / Yannick Stupples-Whyley | All schools | 3 |
| 3 | Inclusion Framework | Ralph Holloway | All schools | 18 |
| 4 | Falling Rolls Fund 2024/25 | Yannick Stupples-Whyley | All schools | 23 |
| 5 | Early Years Update | Carolyn Terry | All schools | 31 |

**Forum Business**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 6 | Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies | Chair | All schools | 40 |
| 7 | Minutes of 25th September 2024 | Chair | All schools | 52 |
| 8 | Minutes Action Log | Yannick Stupples-Whyley | All schools | 72 |

**Information Papers for Discussion**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 9 | School Meals Advisory Service Update | Gareth Honeyford | All schools | 75 |
| 10 | Constitution & Membership of Schools Forum | Yannick Stupples-Whyley | All schools | 78 |
| 11 | Forward Plan | Yannick Stupples-Whyley | All schools | 86 |

**Closing Comments**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 12 | Closing Comments | Chair |  | 88 |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 1** |
| Date: 27 November 2024 |  |

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 you 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.

Voting will be undertaken using Polls in the meeting chat. Should polls fail to work the meeting chat will also be used for voting purposes. Please type:

* Agree, if you agree the recommendation,
* Disagree, 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.

The meeting will be recorded solely for the purpose of writing the minutes.

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 2** |
| Date: 27 November 2024 |  |

**REPORT TITLE: SCHOOLS & HIGH NEEDS FUNDING 2025/26**

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 latest information of funding for 2025/26.

1.2 To update Schools Forum of the latest financial position of the Dedicated Schools Grant (DSG) for 2024/25.

1.3 To present Schools Forum with the Authority’s DSG Management Plan.

1.4 To update Schools Forum of the outcome of the school funding consultation with schools.

1.5 To present Schools Forum with the recommendations of the Finance Review Group (FRG) and High Needs Review Group (HNRG) for the Authority’s final funding proposals for 2025/26

**2. Recommendations**

2.1 To note the funding information for 2025/26.

2.2 To note the updated financial position of DSG for 2024/25.

2.3 For the secondary maintained member to agree the recommendation of FRG and HNRG to approve de-delegation for 2025/26 at 6.1.

2.4 To agree the recommendation of FRG and HNRG to approve the plans set out in the DSG Management Plan and at 7.7 to 7.11.

2.5 To agree the recommendation of FRG / HNRG that the Authority uses the funding mechanisms highlighted at 9.1 to meet the requirements of the NFF in 2025/26.

2.6 To agree a 0.5% transfer from the Schools Block to the High Needs Block in 2025/26.

2.7 To agree the recommendation of the FRG / HNRG that Schools Forum agrees a total 1% transfer from the Schools Block to the High Needs Block in 2025/26, subject to the final decision of the Secretary of State.

###### 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 |
| Movement of up to 0.5% from the schools block to other blocks | Proposes | Decides | Adjudicates where schools forum does not agree local authority proposal |
| Movement of above 0.5% from the schools block to other blocks. | Proposes | Must be consulted | Secretary of State will decide. |

###### 4. Background

**Autumn Budget 2024**

4.1 The Chancellor’s budget on 30th October 2024 announced a **2.3bn** increase in the core schools budget to **£63.9bn** for 2025/26.

4.2 **Table 2** shows the increase in the Core Schools Budget since 2021/22

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 2021/22  £bn | 2022/23  £bn | 2023/24  £bn | 2024/25  £bn | 2025/26  £bn |
| Total Funding | 49.8 | 53.8 | 57.7 | 61.6 | 63.9 |
| Year-on Year Increase |  | 4.0 | 3.9 | 3.9[[1]](#footnote-2) | 2.3 |

4.3 The DfE provided further details on Friday 1st November. **£1bn** of the increase is allocated to high needs funding which increases funding to **£11.9bn**.

4.4 The remaining **£1.3bn** increase will fund the following:

* The remaining costs of the 2024 teacher’s pay award in mainstream schools
* An increase to the mainstream schools national funding formula
* Increases to the pupil premium and other elements of core funding.

4.5 The DfE provided additional information on 5th November with the publication of the Summary Policy Note for 2025/26.

4.6 Local authorities will be required to move their local formula factor values at least 10% closer to the NFF factor value, except where local funding formulae are already mirroring NFF. Essex mirrors NFF for all factors except the KS4 basic entitlement. Essex will also be required to move the London weighting multiplier at least 10% closer to the NFF weighting.

4.7 Local authorities must set the minimum funding guarantee between -0.5% and 0% in 2025/26.

4.8 The DfE expects to publish the final NFF allocations by the end of November and the DSG allocation will be announced as usual in December.

4.9 **Table 3** shows how the funding for Teachers’ Pay Additional Grant (TPAG), the Teachers’ Pension Employer Contribution Grant (TPECG) and the Core Schools Budget Grant (CSBG) are baselined into DSG.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | TPAG  £ | TPECG  £ | CSBG  £ | Total  £ |
| Basic Entitlement  Primary  KS3  KS4 | 62  86  98 | 75  106  119 | 76  108  122 | 213  300  339 |
| Primary FSM6 | 53 | 65 | 70 | 188 |
| Secondary FSM6 | 77 | 100 | 100 | 277 |
| Lump Sum | 2,306 | 2,800 | 2,900 | 8,006 |

4.10 **Table 4** shows the provisional unit values of each NFF value for 2025/26

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 2024/25  £ | 2025/26  Former Grants  £ | 2025/26  Uplift to CSBG  £ | 2025/26 NFF Uplift  £ | Provisional 2025/26  £ |
| Basic Entitlement:  Primary  KS3  KS4 | 3,562  5,022  5,661 | 213  300  339 | 51  71  80 | 21  29  33 | 3,847  5,422  6,113 |
| FSM:  Primary  Secondary | 490  490 | 0  0 | 0  0 | 5  5 | 495  495 |
| FSM6:  Primary  Secondary | 820  1,200 | 188  277 | 45  68 | 7  10 | 1,060  1,555 |
| IDACI:  Primary Band F  Primary Band E  Primary Band D  Primary Band C  Primary Band B  Primary Band A  Secondary Band F  Secondary Band E  Secondary Band D  Secondary Band C  Secondary Band B  Secondary Band A | 235  285  445  485  515  680  340  450  630  690  740  945 | 0  0  0  0  0  0  0  0  0  0  0  0 | 0  0  0  0  0  0  0  0  0  0  0  0 | 0  0  0  5  5  5  0  0  5  5  5  5 | 235  285  445  490  520  685  340  450  635  695  745  950 |
| Low Prior Attainment:  Primary  Secondary | 1,170  1,775 | 0  0 | 0  0 | 5  10 | 1,175  1,785 |
| EAL:  Primary  Secondary | 590  1,585 | 0  0 | 0  0 | 5  10 | 595  1,595 |
| Mobility:  Primary  Secondary | 960  1,380 | 0  0 | 0  0 | 5  5 | 965  1,385 |
| Lump Sum | 134,400 | 8,006 | 1,915 | 779 | 145,100 |
| Sparsity:[[2]](#footnote-3)  Primary  Secondary | 57,100  83,000 | 0  0 | 0  0 | 300  400 | 57,400  83,400 |
| Split Sites:  Basic Eligibility  Distance Eligibility | 27,100  53,500 | 0  0 | 0  0 | 100  300 | 27,200  53,800 |
| Minimum per Pupil Level:  Primary  Secondary | 4,610  5,995 | 257  350 | 62  83 | 26  37 | 4,955  6,465 |

**High Needs Block**

4.11 At a national level the High Needs Block increases by **£1bn** to **£11.9bn**.

4.12 The DfE will set aside **£480m** to be allocated through the Core Schools Budget Grant in 2025/26 which will combine the high needs elements of the 2024/25 TPAG, TPECG and the full year CSBG.

4.13 The DfE will also hold back **£145m** for adjustments such as the impact of the October Census. The remaining **£11.3bn** will be allocated through the High Needs NFF.

4.14 The historic spend factor will remain at the same cash value as 2024/25, which for Essex is **£61.5m**, which will be equivalent to an average 25% of local authorities 2025/26 allocations, reducing from 27% in 2024/25.

4.15 In recognition of the continuing high level of cost increases that most local authorities are experiencing, the funding floor provides a minimum increase of 7% per head of a local authority’s 2-18 population. Gains will be limited to 10% per head of a local authority’s 2-18 population.

4.16 The MFG for special schools is 0% for 2025/26.

**Central School Services Block**

4.17 At a national level funding for the ongoing responsibilities element of CSSB funding increases from **£304m** in 2024/25 to **£338m** in 2025/26.

4.18 This includes the centrally employed teachers elements of the TPECG and CSBG, alongside funding for copyright licences which was issued separately in 2024/25, but is rolled into CSSB in 2025/26.

4.19 A further **£4m** will be provided to cover additional exceptional copyright licences costs in 2025/26. This will be calculated at 7.1% of each authority’s copyright licences costs for 2024/25.

4.20 Funding for ongoing responsibilities is protected so that the maximum year-on-year per pupil reduction is at -2.5% and gains are capped at 2.98%.

4.21 Historic commitments continue to reduce by 20%.

**Early Years Block**

4.12 The provisional Early Years Block settlement is not announced until December.

**5. DSG Updated Forecast 2024/25**

5.1 **Table 5** shows the updated forecast for the HNB for 2024/25.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 2024/25  £m | 2025/26  £m | 2026/27  £m | 2027/28  £m | 2028/29  £m |
| Expenditure | 253.9 | 284.0 | 319.0 | 354.2 | 397.1 |
| Income | (239.1) | (246.2) | (253.6) | (261.2) | (269.1) |
| (Surplus) / Deficit | 14.8 | 37.8 | 65.4 | 93.0 | 128.0 |
| Balance b/fwd | (11.3) | 3.5 | 41.3 | 106.7 | 199.7 |
| Balance c/fwd | **3.5[[3]](#footnote-4)** | **41.3** | **106.7** | **199.7** | **327.7** |

5.2 The outturn forecast for the HNB has adversely moved **£4.5m** since the last update in September.

5.3 The forecasts for 2025/26 to 2028/29 will be updated after the final iteration of the budget.

5.4 **Table 6** shows the updated forecast for the whole of DSG.



5.5 The DfE has notified the Authority that it will clawback the £4.4m over funding for 2022/23 when 66 schools claimed pupils on both the Early Years Census and the Schools Census. The **£15.9m** in-year movement is due to the following:

* Clawback for 2023/24 **£8.5m**
* Clawback for 2022/23 **£4.4m**
* Transfer of EY Inclusion Fund from HNB **£3.0m**

5.6 If the trajectory of the monthly movement in the HNB continues it is likely that the whole of DSG will be in deficit at 31st March 2025.

**6. De-delegation 2025/26**

6.1 **Table 7** shows the Authority’s proposals for de-delegation for maintained secondary schools for Public Duties for 2025/26 and shows a comparison with previous years.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Primary | 2022/23  Per Pupil  £ | 2023/24  Per Pupil  £ | 2024/25  Per Pupil  £ | 2025/26 Provisional  Per Pupil  £ | 2025/26  Provisional  Budget  £ |
| Basic Entitlement  KS3  KS4 | 4,427.25  5,391.64 | 4,683.47  5,573.32 | 4,975.15  5,826.84 | 5,286.79  6,191.83 |  |
| Public Duties (1) | 1.00 | 1.00 | 1.00 | 1.00 | 3,522 |
| Total De-delegation | **1.00** | **1.00** | **1.00** | **1.00** | **3,522** |

1. The de-delegation requested for Public Duties enables schools to receive funding for employees who undertake union duties, employees who undertake magistrate duties and for employees who attend jury service. It also enables schools to receive support from the trade unions.

**7. DSG Management Plan**

7.1 The DSG conditions of grant requires any local authority with an overall deficit on its DSG account, or whose DSG surplus has substantially reduced during the year, to present a plan to the DfE for managing their future DSG expenditure.

7.2 The management plan is split into three main sections:

* Summary financial, pupil data and narrative (white tabs)
* Detailed narrative information (green tabs)
* Detailed breakdown of financial and pupil data by placement type (red tabs)

7.3 The management plan is a working document that will be updated to reflect the latest financial forecast and as plans are developed to reduce expenditure. Schools Forum will receive regular updates on the management plan.

7.4 **Figure 1** shows the financial summary from the DSG management plan.



7.6 **Figure 2** shows the forecast number of EHCPs broken down by age group from the DSG management plan.



7.7 The management plan also shows the following initial workstreams to reduce expenditure. These have previously been discussed with Schools Forum

* Inclusion Strategy & Framework
* Outreach
* SEND Sufficiency Plan
* Review of Independent school expenditure

7.8 The inclusion strategy / framework aims to support schools to remove barriers to education, in a timely way, without the need to resort to statutory processes, where appropriate. It underpins sustainable culture change as well as intervention at an individual and cohort level. The process and resources associated with the Inclusion Framework have evolved and improved since it is pilot phase and feedback from schools has been instrumental in its development.

7.9 The Outreach provision aims to help schools to meet the needs of pupils with SEN Support and EHCPs preventing the escalation to special schools and reducing permanent exclusions.

7.10 The SEND sufficiency plan, due for publication in autumn 2024, will set out our intention to manage special school growth by reducing the numbers of children and young people with lower levels of need overtime as we work with mainstream schools to be better able to manage their needs locally. This will enable us to accommodate more children and young people with higher levels of need in special schools.

7.11 The Authority established a working group to review expenditure on independent school placements and to look at investment options in more cost-effective provisions.

**8. School Funding Consultation**

8.1 The consultation was held with schools between Monday 30th September and Sunday 27th October.

8.2 **Table 8** shows the responses received.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Total Schools | Total Responses | % Responded |
| Primary | 446 | 5 | 1.1 |
| All-Through | 2 | 0 | 0.0 |
| Secondary | 79 | 2 | 2.5 |
| Special | 22 | 1 | 4.5 |
| Total | **549** | **8** | **1.5** |

8.3 The first part of the consultation concerned the changes the Authority may need to make to ensure the Essex local funding formula conforms with the DfE’s requirements in calculating school budget allocations.

8.4 Question 1 asked do schools approve the Authority adjusting the minimum / maximum values to ensure the requirements of the Schools NFF are met. **Table 9** shows the responses received and that overall schools are in favour.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Yes | No | Unsure |
| Primary | 2 | 2 | 1 |
| Secondary | 1 | 1 | 0 |
| Special | N/A | N/A | N/A |
| Total | **3** | **3** | **1** |

8.5 Question 2 asked should the Authority be required to move the amount funded for any factor towards the minimum value allowed, do schools prefer the Authority adjusts additional needs factors or the lump sum. **Tables 10** shows the responses received.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Primary | IDACI | Prior Attainment | EAL | Mobility | Lump Sum |
| Primary | 1 | 2 | 1 | 3 | 1 |
| Secondary | 1 | 0 | 2 | 2 | 1 |
| Special | N/A | N/A | N/A | N/A | N/A |
| Total | **2** | **2** | **3** | **5** | **2** |

8.6 Question 3 asked do secondary schools agree that the Authority moves the KS3 / KS4 basic entitlement weighting towards the NFF weighting, if required to meet the maximum value allowed for the KS4 basic entitlement. **Table 11** shows the response of schools.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Yes | No | Not Sure |
| Secondary | 1 | 1 | 0 |

8.7 Question 4 asked do schools agree that the Authority, if required, lowers the value of MFG in 2025/26 to meet the requirements of NFF. **Table 12** shows the responses from schools.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Yes | No | Unsure |
| Primary | 1 | 2 | 2 |
| Secondary | 1 | 1 | 0 |
| Special | N/A | N/A | N/A |
| Total | **2** | **3** | **2** |

8.8 Question 5 asked do schools support the use of capping school gains to meet the requirements of the NFF for 2025/26. **Table 13** shows the responses from schools.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Yes | No | Unsure |
| Primary | 2 | 1 | 2 |
| Secondary | 1 | 1 | 0 |
| Special | N/A | N/A | N/A |
| Total | **3** | **2** | **2** |

8.9 Question 6 asked do schools support that the Authority moves the London Weighting multiplier, as necessary, to meet the minimum value allowed for 2025/26. **Table 14** shows the responses from schools.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Yes | No | Unsure |
| Primary | 3 | 0 | 2 |
| Secondary | 1 | 1 | 0 |
| Special | N/A | N/A | N/A |
| Total | **4** | **1** | **2** |

8.10 Question 7 asked do schools support the proposal to transfer 1% from the Schools Block to the High Needs Block for the reasons set out in the consultation paper and following the discussion by Schools Forum on the 25th September. **Table 15** shows the responses from schools.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Yes | No | Unsure |
| Primary | 3 | 2 | 0 |
| Secondary | 0 | 2 | 0 |
| Special | 1 | 0 | 0 |
| Total | **4** | **4** | **0** |

**9. Local Authority Proposals**

9.1 Taking into account the responses to the consultation, the Authority’s proposals for the Schools Block are:

* To adjust additional needs factors towards the minimum values allowed, if required to meet the requirements of NFF for 2025/26.
* To adjust the lump sum towards the minimum value allowed, if required to meet the requirements of NFF for 2025/26.
* To adjust the KS3 / KS4 basic entitlement towards the NFF weighting, if the KS4 basic entitlement is higher than the permitted value.
* To adjust the value of MFG towards the minimum value allowed, if required to meet the requirements of NFF for 2025/26.
* To use capping of schools gains, if required to meet the requirements of NFF for 2025/26.
* To increase the London weighting multiplier by the minimum amount required.

9.2 The response for transferring 1% from the Schools Block and High Needs Block is tied overall, with primary 3-2 in favour, secondary 0-2 against and special 1-0 in favour. FRG and HNRG recommend to Schools Forum that the transfer is approved subject to the final decision of the Secretary of State, **which was approved by 11 members and 2 members abstained.**

**10. Background / Supporting papers.**

10.1 Annex A shows the comments made by schools in relation to each question in the consultation.

**Agenda Item 2 – Annex A**

**Comments received from Schools**

|  |  |
| --- | --- |
| Question | Comments |
| Do schools approve the Authority adjusting the minimum / maximum values to ensure the requirements of the Schools NFF are met? - Please add any comments | The question is ambiguous and to answer "yes" would allow values to be reduced which I do not support. There is a need for these values to be uplifted to enable schools to meet increasingly challenging needs of new intakes following covid shutdowns and the economic downturn.  We would only approve NFF if it was higher to allow for the 1%. This money needs to be added as additional funding not taken from schools already overstretched block funding.  KS3 and KS4 are funded through very different points on the minimum/maximum scale. To simply adjust the maximum, affecting (effectively) KS4 only, disproportionately impacts upon schools moving towards the NFF in a negative sense (there is no counterbalancing of KS3). This is at a time when Essex is coping with RAAC in schools at a level unprecedented in any other county.  We cannot afford to lose this amount from our funding. This would result in us having to consider redundancies of support staff. |
| Should the Authority be required to move the amount funded for any factor towards the minimum value allowed, this can be done by either adjusting additional needs factors or the lump sum. Do schools prefer the Authority adjusts additional needs factors or the lump sum? - Why have you selected these options? | This will enable schools to meet the increasing overheads associated with school-wide resources and support groups linked with these factors which we currently draw on pupil premium funds to support. It may also enable a clearer distinction between the purpose of this funding stream and IPRA/EHCP tied to pupils with a restatement of the expectation that sum £x of LSA SEN costs are met from this which may persuade / enable schools to appointment a pool of floating LSA SEN staff as permanent members of the establishment which gives continuity, valuable retention of institutional knowledge and specialist skills development with faces known to families in the local community.  These factors attract the least cost to mainstream schools and will have the least impact.  Do not agree with funding being shifted as all funding is lower than needed anyway and just causes issues elsewhere.  These are the factors which most affect our school.  Prior attainment post pandemic remains the biggest and most acute challenge for schools to address at a time when tutoring funding has been substantially reduced.  None of the above apart from Mobility because we do not receive any funding for this. |
| Do secondary schools agree that the Authority moves the KS3 / KS4 basic entitlement weighting towards the NFF weighting, if required to meet the maximum value allowed for the KS4 basic entitlement? - Please add any further comments | These factors should not be considered in isolation as per the answer to previous questions. Adjusting KS4 levels down, without considering the underfunding of KS3 versus NFF, adversely affects schools with significant numbers of examination cohort students. |
| Do schools agree that the Authority, if required, lowers the value of MFG in 2025/26 to meet the requirements of NFF? - Why have you selected your response? | I would need to see models of the impact before commenting on this - a scenario on a reduction 0.4%, 0.25% and 0.0% would be useful.  As before - more funding is needed not less or moving from one pot to another.  There is acute financial pressure on schools and a number in Essex are at or below MF levels. Essex is struggling to compete with neighbouring areas in staff recruitment when considering income available versus cost of living. To adjust this level downwards would affect those most struggling in this respect at the moment. This may add further to a cycle of school's ability to challenge examination outcomes across the county which are below national averages.  This will affect our budget by lowering it. |
| Do schools support the use of capping school gains to meet the requirements of the NFF for 2025/26? - Please outline the reasons for your response | This seems reasonable and a sensible budgeting principle however I suspect there will be strong resistance.  As before. Schools should not be capped; funding should be increased externally.  This would disproportionately affect schools with significant local changing needs e.g., student numbers or other similar factors to accommodate. |
| Do schools support that the Authority moves the London Weighting multiplier, as necessary, to meet the minimum value allowed for 2025/26? - Please explain your response | This would seem to accentuate a rather arbitrary divide in Essex that makes some schools more competitive in staff recruitment than others with no tangible difference in living expense (e.g., London Fringe vs no allowance).  Does not affect our school. |
| Do schools support the proposal to transfer 1% from the Schools Block to the High Needs Block for the reasons set out in this paper and following the discussion by Schools Forum on the 25th September? - Please explain the reasons for your response | This transfer could have a massive impact on schools that are just getting by create major problems that will require schools to cut curriculum and staffing to cope. It will not solve the HNB under-funding issue and will just create more problems for struggling schools. Academy reserve balances are incredibly varied and many will not have the capacity to absorb yet another hit to core funding.  The Place-Led and Top-Up funding hasn't been increased since at least 2012, thus putting Special Schools under immense financial pressure as this equates to a 30% cut over that period.  Mainstream schools have had a number of incremental increases over that period, similarly introducing the MFG - not sure how/why Specials have been treated differently.  "The true measure of any society is how it treats its most vulnerable."  As previously explained. More money needs to be allocated rather than moving around the insufficient amount already in place.  Looking at the evidence provided on page 21 of the guidance the impact of this move on some schools could be SUBSTANTIALLY more than 1%.   ANY reduction in funds to schools is likely to see a reduction in curriculum provision at a time when post pandemic vulnerabilities are at their most acute in a number of areas.   At the possible levels described, significant redundancies would seem likely in a number of locations. Given the acute struggles to recruit in a number of locations in the county, any further reduction in confidence in the profession locally could see a talent pool shift to other sectors or areas of the country where the rewards are more closely balanced with costs (an obvious local example would be to inner London boroughs).   There are real dangers in the some of the methods suggested in this consultation and the lack of transparency over possible impact means that the LA and schools could be sleep-walking into very challenging financial positions with little or no time to address this or adapt costs.  In short, it is highly likely that at least a handful of schools are left in a 'mess'.  The High Needs National Funding Formula does not fund the increased demand appropriately. The Authority should not be taking the difference from Schools Block funding. This would result in schools losing funding and potentially having to lose support staff to pay for it. The Authority needs to go back to the DfE before penalising schools. 1% of our school funding for the additional needs factors equates to approximately £10k .  To balance the HNF, future years will require an even higher percentage to be taken from schools. The graphs show that HNF will continue to increase (Chart 4).  In Table 9, Academies have massive overall carry forward balances compared to mainstream schools. If the Safety Valve scheme includes clawback of balances, why does this not include Academies? |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 3** |
| Date: 27 November 2024 |  |

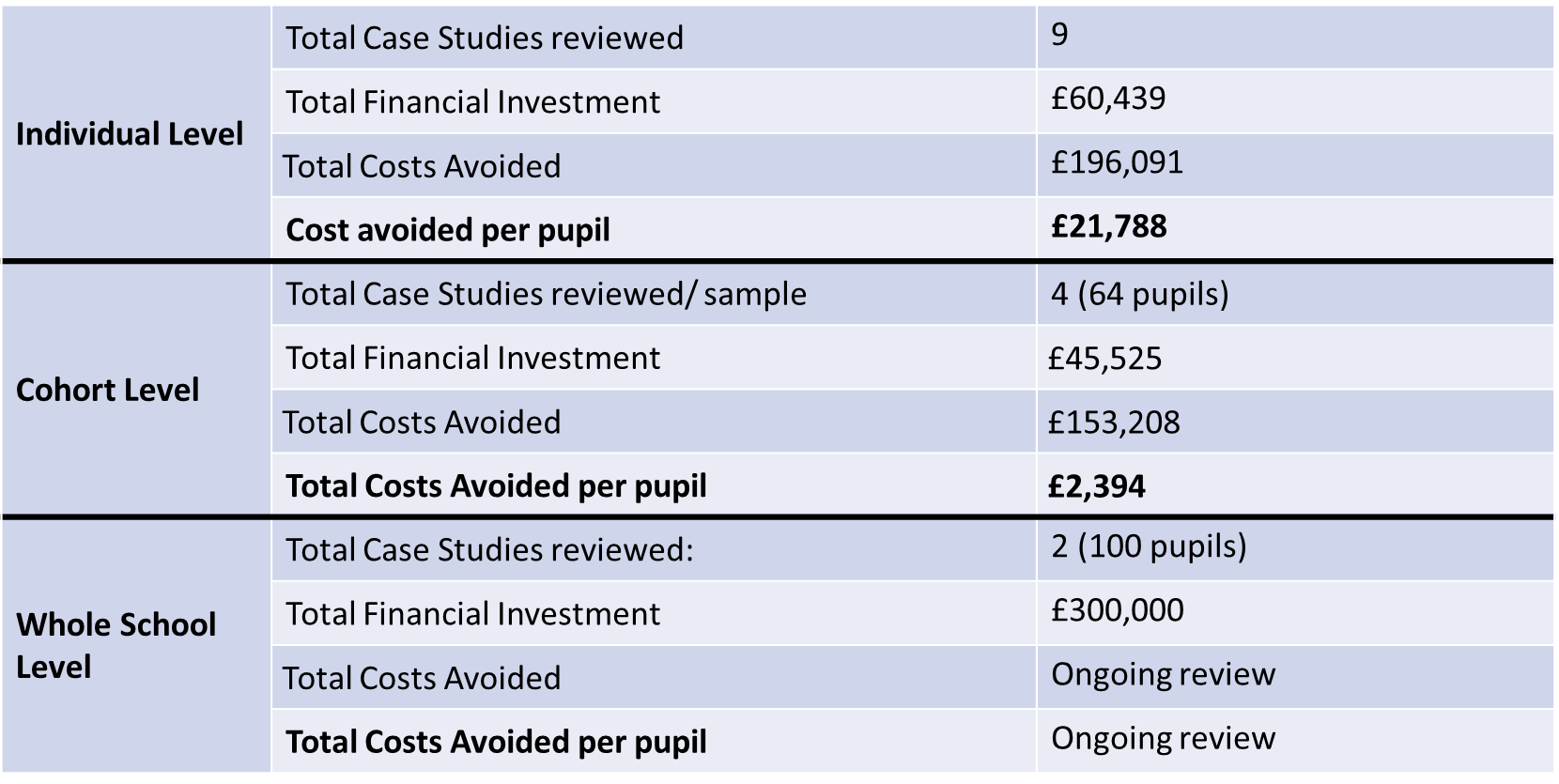
**REPORT TITLE:** Inclusion Framework Evaluation and Next Steps

Report by Ralph Holloway, Head of SEND Strategy & Innovation

Contact details: Ralph. Holloway@essex.gov.uk

1. **Purpose of report** 
   1. To provide an update on impact of the Inclusion Framework as an early intervention and cost avoidance approach.
2. **Recommendations** 
   1. To agree the recommendation of FRG / HNRG to the continuation of the Inclusion Framework approach as-is, and to receive a further impact report at the end of the academic year 2024-25.
   2. To note that the funding allocated for 2025/26 is **£2m** which is within the **£3.5m** funding for early intervention notified to Schools Forum in September.
3. **Background**
   1. The Inclusion Framework (IF) aims to support schools to remove barriers to education, in a timely way, without the need to resort to statutory processes, where appropriate. The IF underpins sustainable culture change as well as intervention at an individual and cohort level. The process and resources associated with the IF have evolved and improved since it is pilot phase and feedback from schools has been instrumental in its development
   2. In September 2023, £2m from the HNB was allocated to the Inclusion Framework for the financial year 2024/25. This funding consisted of an ongoing £1m base funding with an injection of an additional £1m for the one year. To date £1.3m, of this funding has been committed for school based projects via the Inclusion Framework Panel. The panel will continue to meet monthly to receive support requests from schools.
   3. The evaluation of the Inclusion Framework set out in this paper, has reviewed the outcomes that have been avoided and the associated costs to the HNB and ECC. This has been undertaken in partnership with schools to determine the likely alternative pathway for the children involved and the costs associated.
   4. The IF does not exist in a vacuum and feedback from schools tells us that impact is greatest when the IF is used in a timely way, supported by the school’s Inclusion Partner and where the school may have also accessed an Inclusion Review, TPP and the wider workforce development offer, including Ready to Regulate.
4. **Evaluation findings**
   1. Previous Evaluation

An evaluation was completed at the end of year 1 (21/22), which concluded that the IF supported cost avoidance. This evaluation looked in detail at the 13 school-based projects supporting 73 students. This was shared with schools Forum in 2022, summary below:



* 1. 2024 Evaluation

We have now undertaken a data analysis exercise comparing several measures for schools engaged with the IF to data for all Essex schools. This does not make assumptions as to the cause/effect nature of the differences in data, but should be read alongside the IF case studies to support an early impact evaluation.

The data reviewed includes:

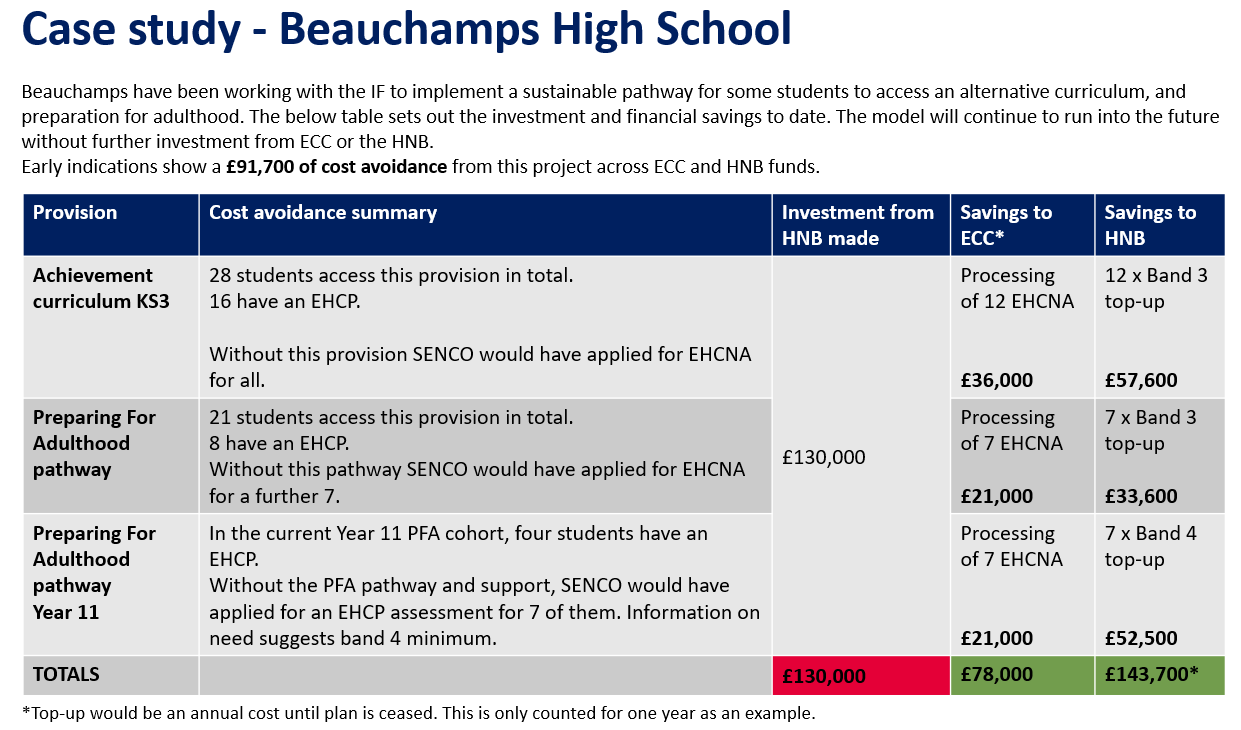
* Absence (Unauthorised, Persistent and Severely Persistent absences)
* Suspension rates
* Permanent exclusion rates

In summary, this analysis has found:

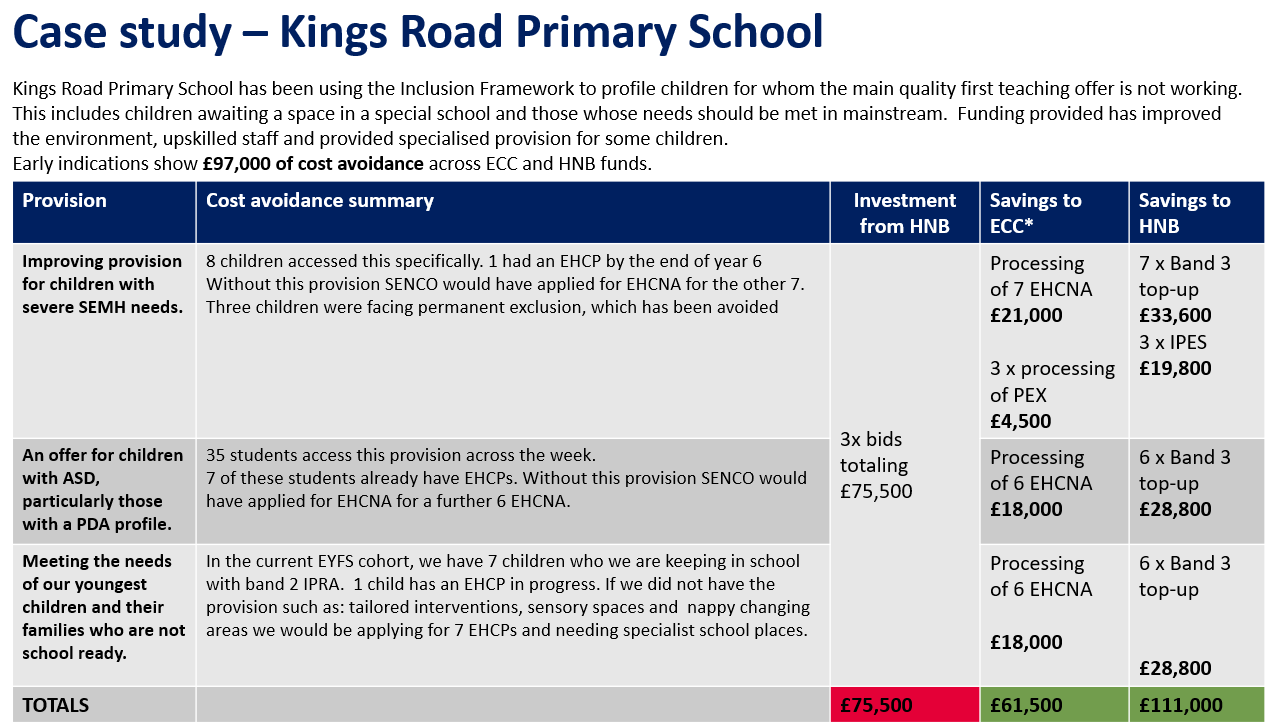
|  |  |
| --- | --- |
| **Prior to commencing with the IF** | The group of schools that accessed the IF in year one had higher % absence, suspension and exclusion rates, prior to accessing the IF, compared to all Essex schools. |
| **Overarching** | **Following engagement in the IF all KPIs were more positive for IF schools** compared with all Essex schools in the 23/24 data.  This includes:   * absence (Unauthorised, Persistent and Severely Persistent absences) * suspension rate * permanent exclusion rate. |
| **Absence** | Severe persistent absence increased by 0.4% for all schools in Essex, but **dropped by 0.1% for year 1 IF schools** between 21/22 and 22/23.  Overall absence **improved at a faster rate for IF schools** (-1.7) compared to all schools ( -1.2) for 22/23 academic year.  Persistent absence **improved at a faster rate for IF schools** (-8.8) compared to all schools ( -6.7) for 22/23 academic year.  The difference in absence rates between the IF school cohort and all Essex schools has reduced from +5% to -0.4%. |
| **Suspensions** | Summary data indicates that suspension rates continue to increase across all schools. Suspension rates increased by 0.91 in year 2 for all Essex schools. However, **it decreased by -1.13 for IF schools**. |
| **Exclusions** | The rate of permanent exclusions was the same in IF schools as all Essex schools in 21/22. In 22/23 it **reduced to 0% for IF schools** compared with 0.02% for all schools and has been sustained. |

* 1. Case studies:[[4]](#footnote-5)

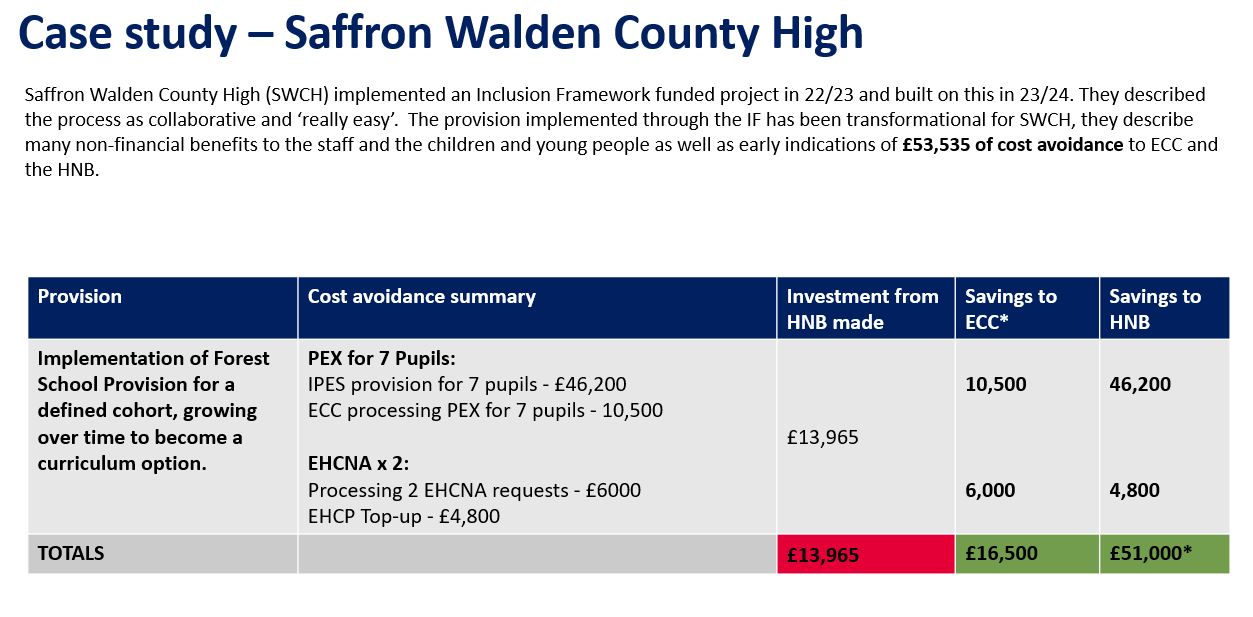
Detailed case studies have been undertaken for a sample of funded projects. Three have been included below as an example:



IF Request was made in 21/22. There was a lead in time for implementation and funding was paid in phases in 22/23 and 23/24. This case study was completed with the school SENCO and the EHCNAs avoided is based on children for whom the SENCO was considering applying for, but to date has not applied. Requests for EHCNA have reduced *from this school* since implementing the IF funded provision. There have been some parental requests, which has given the project team some intelligence to develop IF information for parents to reduce these in future.



This case study was completed with the headteacher. The number of EHCNA avoided is based on children for whom the SENCO was considering applying for, but to date has not applied. Overall, the number of EHCNA requests for Kings Road have reduced since implementing the IF funded project. They have a higher than average (nearly double) % of children on SEN Support.



This case study is based on information supplied during the review with IP and follow-up conversation with the project team. No EHCNA have been submitted by the school since implementing the IF funding provision. There have been some parental and LA requests. The school has a higher than average SEN Support and EHCP population.

1. **Financial Implications**
   1. The current forecast for the High Needs Block is a cumulative deficit in excess of £290 million by the end of 2028/29 and this trajectory must change if the Authority is to operate within the DSG funding available.
   2. The Inclusion Framework is one proposal that is to invest in early intervention in 2025/26 to help make the high needs block sustainable in future years. As part of the proposal all expenditure will be evaluated for effectiveness in delivering not only positive outcomes but delivering financial benefits to the High Needs Block in terms of avoiding future costs that are currently driving the deficit. If these benefits are not realised the Inclusion Framework will cease.
   3. Based on the early indications from the current financial year of delivering positive outcomes and avoiding potential future costs, it is proposed funding of £2m continues to be made available for school-based Inclusion Framework projects for 2025/26. If the Framework is to continue into 2026/27 funding will be at £1m p.a pending the delivery of necessary benefits.

5.4 To apply for funding, schools can work with their Inclusion Partner (and SEP/EP) to submit a request for one-off funding to the Inclusion Framework Panel for inclusion projects which are specific to their cohorts of children and young people. Proposals must focus on the pillars of inclusion (wellbeing, relationships, attending, participating, achieving and moving-on) and must demonstrate sustainability, inclusive culture and ethos, ability to reduce escalation or future demand and appropriate use of public funds. Small projects will be considered under £5,000, medium projects under £20,000 and large projects £20,000+. Schools are encouraged to work together to design projects which will impact across their Trust and/or school partnership. Guidance on the panel process and considerations can be found here: <https://essexcc.pagetiger.com/dcneqoo/1>

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 4** |
| Date: 27 November 2024 |  |

**REPORT TITLE: FALLING ROLLS FUND 2024/25**

Report by Yannick Stupples-Whyley

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

**1. Purpose of report**

1.1 To present to Schools Forum the additional schools recommended by the Finance Review Group (FRG) to be funded through the Falling Rolls Fund for 2024/25

**2. Recommendations**

2.1 To agree the recommendation of FRG that; Mistley Norman Primary and Dr Walkers Primary are funded through the falling rolls fund for 2024/25.

2.2 To agree the recommendation of FRG that Holt Farm Infant are not added back to the falling rolls fund.

2.3 To agree the recommendation of FRG that the applications from Hilltop Infant and Chigwell Primary are reviewed by FRG and brought to the January meeting.

2.4 To agree the recommendation of FRG that a review of the criteria of the falling rolls fund is undertaken.

2.5 To approve the recommendation of FRG to approve the funding shown in Table 2 at 5.2.

###### 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 for the Falling Rolls Fund.

|  |  |  |  |
| --- | --- | --- | --- |
| Function | Local Authority | Schools Forum | DfE |
| Central spend on and the criteria for allocating funding for [falling rolls](#_Falling_rolls_fund) where growth in pupil numbers is expected within three years. | Proposes | Decides | Adjudicates where schools forum does not agree local authority proposal |

###### 4. Background

4.1 Schools Forum agreed the criteria for the falling rolls fund at the January 2023 meeting and the balances criteria at the May 2023 meeting.

4.2 The requirement for schools to be judged good or outstanding by Ofsted has been removed from 1st April 2024.

4.3 There are 8 schools currently within the falling rolls fund for 2024/25.

* Prettygate Infant School
* St Mary’s Primary, Hatfield Broad Oak
* Clavering Primary
* Wethersfield Primary
* Finchingfield Primary
* Tollesbury Primary
* St John the Baptist, Pebmarsh
* St Mary’s Primary, Ardleigh

4.4 Schools Forum were made aware at the meeting on 10 July 2024 that there could be further applications from 3 academies if their actual balances at 31st August 2024 met the balance criteria.

4.5 Mistley Norman has supplied its balance at 31st August 2024 and two additional claims have been received from Dr Walker’s Primary and Hilltop Infant School, both of which had missed the original e-mail from the Authority. Chigwell Primary submitted their closing balance at 31st August 2024 after the FRG meeting.

4.6 Holt Farm Infant has requested that the decision to remove the school from the Falling Rolls Fund is reconsidered. FRG did previously discuss the option of keeping the school in the falling rolls fund but allocating no funding for 2024/25. The school is indicating it will meet the criteria in 2025/26.

4.7 Annex A shows the full details of each application.

4.8 FRG recommends that the following schools receive falling rolls funding in 2024/25 as shown in Table 2 below.

* Mistley Norman
* Dr Walker’s

4.9 FRG recommends that Holt Farm Infant is not added back within the falling rolls fund.

4.10 FRG recommends that the application from Hilltop Infant and Chigwell Primary are discussed at the next meeting on 10th December, with the recommendations presented to January’s Schools Forum.

4.11 FRG also recommends that a review of the criteria is undertaken.

**5. Financial Implications**

5.1 Schools Forum approved a budget of **£836,000** for 2024/25.

5.2 **Table 2** shows the funding that will be paid to each school if Schools Forum approves the schools listed at 4.6

|  |  |  |
| --- | --- | --- |
| School | 2023/24  £ | 2024/25  £ |
| Clavering Primary | 91,409 | 113,683 |
| Finchingfield Primary | 57,554 | 88,815 |
| Prettygate Infant | 121,878 | 145,656 |
| St Mary’s Primary, Hatfield Broad Oak | 60,939 | 88,815 |
| Wethersfield Primary | 20,313 | 42,631 |
| Tollesbury Primary | 0 | 28,421 |
| St John the Baptist Primary | 0 | 35,526[[5]](#footnote-6) |
| St Mary’s Primary Ardleigh | 0 | 28,421 |
| Mistley Norman Primary | 0 | 56,841 |
| Dr Walker’s Primary | 0 | 110,130 |
| Total | **352,093** | **738,938** |

5.3 The required funding of **£739,000** is lower than the approved budget of **£836,000**. If Hilltop Infant satisfy the criteria of the Falling Rolls Fund, an additional **£163,000** will be funded that will increase funding to **£902,000**. This will require **£66,000** to be funded from the Schools Block surplus balance.

**6. Other Resource Implications**

**7. Consultation with stakeholders**

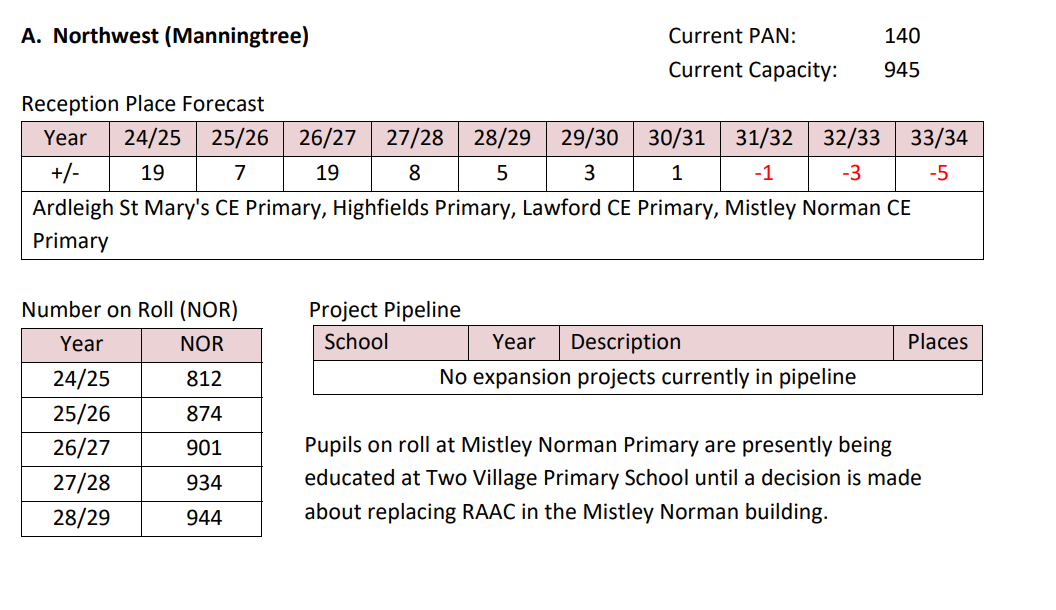
**8. Background / Supporting papers.**

8.1 Annex A – School Applications

Annex B

**Mistley Norman Primary**





The school meets the consecutive two years of falling rolls of 4% or greater. The roll must increase by Year 3 (October 2025) and in subsequent years, which is demonstrated in the school’s pupil forecast above.

The school is in the process of being re-brokered from the Vine Schools Trust to the Canonium Trust. The Chief Financial and Operating Officer at Canonium Trust has provided an update on the balance at 31st August 2024. The school has a balance of £135,942, however due to the 5% GAG restriction only £18,001 will transfer to the Canonium Trust, which is 5% of the school’s GAG allocation for 2023/24. The Trust has provided an e-mail from the DfE which confirms that excess funds above 5% are not transferred to the new Trust. The balance payable to the Canonium Trust meets the balance criteria.

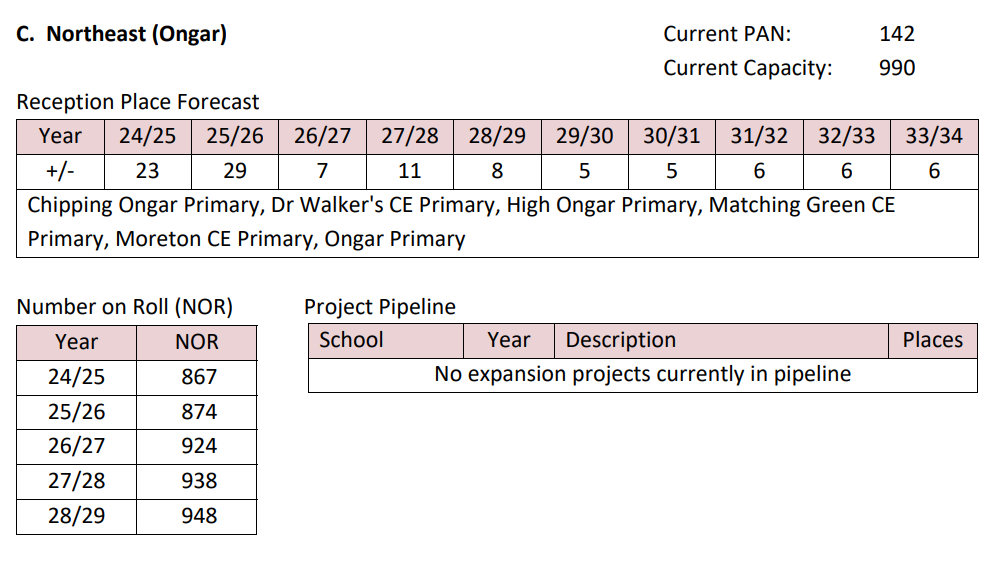
The funding based on pupil forecasts is:

|  |  |  |
| --- | --- | --- |
| Year | Pupils | £ |
| 2024/25 | 16 | 56,841 |
| 2025/26 | 16 | 56,841 |
| 2026/27 | 16 | 56,841 |
| 2027/28 | 16 | 56,841 |
| 2028/29 | 16 | 56,841 |

FRG proposes that Mistley Norman Primary receives **£56,841** for 2024/25.

**Dr Walker’s Primary**





The school meets the required two consecutive falling rolls of 4% or greater. The NOR must increase by year 3 (October 2025) which is demonstrated on the schools forecast above.

The school has a balance of £63,943 which is 11.2% of their 2023/24 funding. Although the balance is above 8% of revenue funding, the average balance has increased to £105,927 and therefore the school meets the balance criteria.

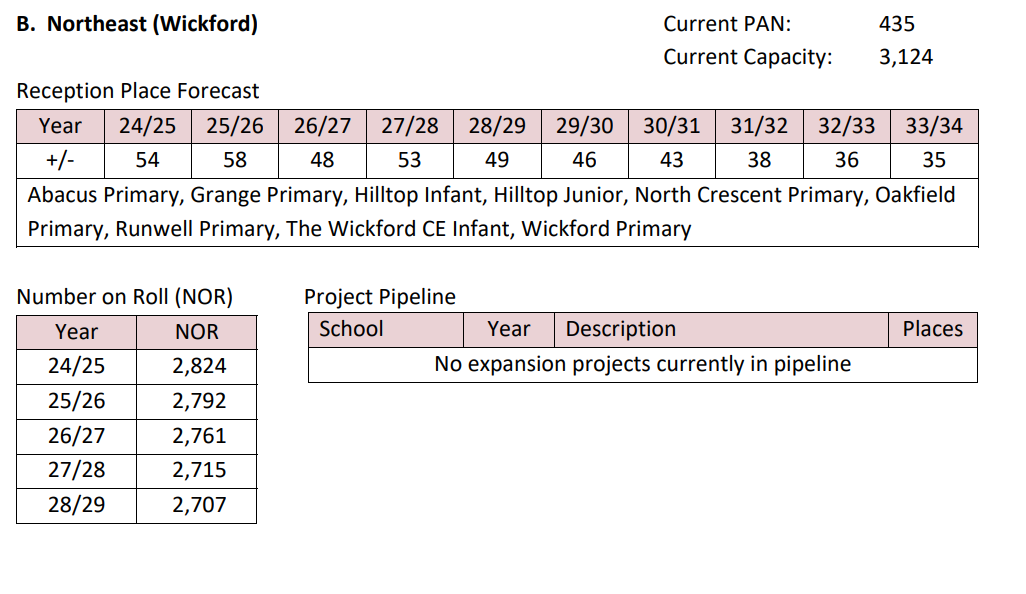
The funding based on pupil forecasts is:

|  |  |  |
| --- | --- | --- |
| Year | Pupils | £ |
| 2024/25 | 31 | 110,130 |
| 2025/26 | 31 | 110,130 |
| 2026/27 | 31 | 110,130 |
| 2027/28 | 31 | 110,130 |
| 2028/29 | 31 | 110,130 |

FRG recommends Dr Walkers Primary receives £110,130 in 2024/25.

**Hilltop Infant**





The school meets the required two consecutive falling rolls of 4% or greater. The NOR must increase by year 3 (October 2025) which is demonstrated on the schools forecast above.

The Hearts Academy Trust has started to pool balances from 2023/24 and has a pooled balance of £1,467,426. A pro-rata calculation on pupil numbers allocates £251,334 to Hilltop Infant which exceeds the balance criteria. However, the school had a balance of £408 at 31st August 2023. The Trust has agreed to provide a balance for Hilltop Infant.

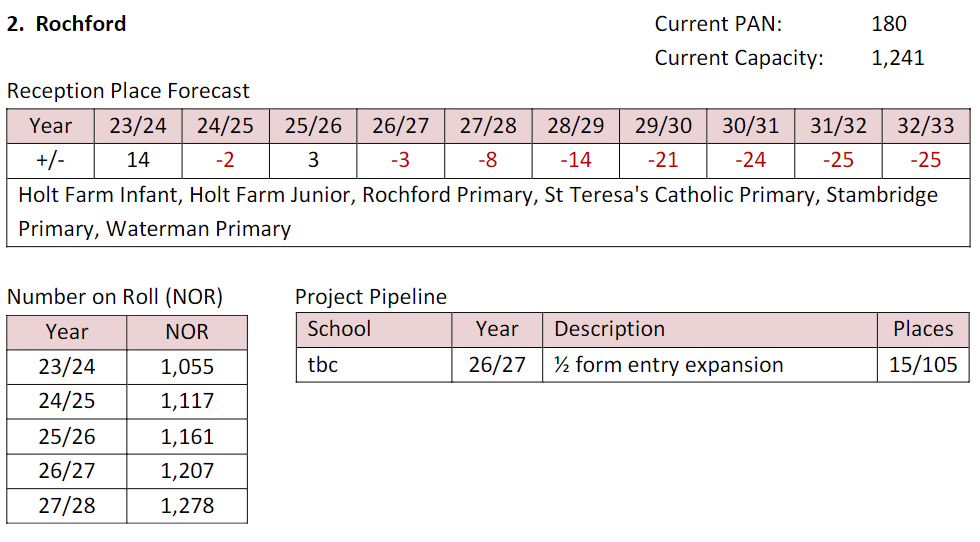
Subject to the balance criteria being achieved, funding based on pupil forecasts is:

|  |  |  |
| --- | --- | --- |
| Year | Pupils | £ |
| 2024/25 | 46 | 163,419 |
| 2025/26 | 46 | 163,419 |
| 2026/27 | 46 | 163,419 |

FRG recommends this is brought back to the next meeting.

**Holt Farm Infant**





The falling roll and subsequent rising roll criteria were met in 2023/24 and the updated pupil forecast above shows the school expects pupils to increase annually from Year 3 (October 2024).

The only requirement for 2024/25 is the balance criteria. The school has a balance of £147,327, which is 16.07% of revenue funding. Although the average balance has increased to £105,927, the balance criteria is not met.

The school delayed purchasing new resources to improve teaching and learning which resulted in a higher balance. Now that the purchases have been made and the need to move to a third reception class the balance at the end of March 2025 is forecast to be £52,066. The school is forecasting a deficit balance of £45,563 at 31st March 2026.

An option previously discussed was to keep the school in the falling rolls fund but to provide no funding for 2024/25. The school is forecasting to meet the criteria in 2025/26.

This option would not set precedent for schools to enter the falling rolls fund as the criteria will always need to be met for a school to be eligible to receive funding, it will help those schools who may have a high balance one year but not the next to stay in the falling rolls fund, but at the same time not to award funding where balances are too high.

The funding based on pupil forecasts is

|  |  |  |
| --- | --- | --- |
| Year | Pupils | £ |
| 2024/25 | 75 | 0 |
| 2025/26 | 75 | 266,444 |

FRG recommends the original decision made in July stands.

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5** |
| Date: 27 November 2024 |  |

**REPORT TITLE: EARLY YEARS FUNDING 2024-25**

Report by Carolyn Terry

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

**1. Purpose of report**

* 1. To update Forum on the forecast budget requirement for 2024/25 of the two, three & four year old Free Early Education Entitlement (FEEE).
  2. To update Forum on the initial take up of the new working parent entitlements for eligible parents of two year olds
  3. To update Forum on the progress of the roll out of the Childcare Reforms Expansion.
  4. To update Forum on the spend to-date on the agreed funding projects and endorses the proposal to implement a third year of funding to extend the four Early Years Early Intervention Partner roles until August 2026.

**2. Recommendations**

* 1. That Forum notes the forecast outturn for 2024/25 at 5.1.

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

2.3 That Forum endorses the proposal to extend the four Early Years Early Intervention Partner roles until August 2026.

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

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

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

###### 4. Background

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

4.2 At the end of the Summer 2024 term report: -

* Across Essex, currently 20% of all two-year-olds are eligible to access the funding.
* The take-up of the disadvantaged two-year-old FEEE during the Summer 2024 term was 2,865, which was 86.9% of the eligible two-year-olds in the county. This take-up figure remains significantly higher than the national take up level for the Summer 2024 term of 74.8%.
* The take up of the new working parents two-year-old FEEE during the Summer term was 6,785, which was 41.1% of the eligible two-year-olds. It is expected that this percentage will increase over the coming terms, and at this point we do not have access to any comparable national or east region data for comparison purposes.
* The take up of the universal three- and four-year-old FEEE at the Summer term 2023 headcount was 24,978, which is 91.9% of the eligible three- and four-year-olds. This is slightly below the national take up of 94.9%.

4.3 The data collection for the Autumn 2024 term is not yet complete and so it is not possible to provide an overview of the take-up for this term; however, it is possible to report on the number of codes that were issued for the new working parent entitlements.

* All ages 87% have been validated which is in line with the national figure
* Under 1s 81% gave been validated, which is slightly under the national figure of 83%
* 1 year olds 87% of codes have been validated which is in line with the national figure
* 2 year olds 89% of codes have been validated which is slightly higher than the national figure of 87%

**5. Financial Implications**

5.1 Table 2 shows the forecast outturn for 2024/25.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Budget  £’000 | Forecast Outturn  £’000 | Variance  £’000 |
| Under 2s | 17,191 | 17,191 | 0 |
| 2 Year Olds Deprived Backgrounds | 12,579 | 12,579 | 0 |
| 2 Year Olds Working Families | 24,035 | 24,035 | 0 |
| 3 and 4 Year Olds | 94,996 | 94,996 | 0 |
| Early Years SENCOs | 1,300 | 1,300 | 0 |
| EY Quadrant Teams | 789 | 796 | 7 |
| Quality & Improvement | 836 | 838 | 2 |
| Contingency | 2,075 | 17,987 | 15,912 |
| Education Service Recharge | 151 | 151 | 0 |
| Corporate Overheads | 498 | 498 | 0 |
| Total | **154,451** | **170,372** | **15,921** |

5.2 The DfE has notified the Authority that it will clawback the **£4.4m** over funding for 2022/23 when 66 schools claimed pupils on both the Early Years Census and the Schools Census. The **£15.9m** in-year movement will be funded from the surplus balance and is due to the following:

* Clawback for 2023/24 **£8.5m**
* Clawback for 2022/23 **£4.4m**
* Transfer of EY Inclusion Fund expenditure from the HNB **£3.0m**

5.3 The DfE are providing an additional **£34m** through the Early Years Budget Grant (EYBG) to support early years providers with their costs following the recent teachers’ pay award. Essex has been allocated **£323,000**.

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

6.1 Since the start of the roll out of the Childcare Reforms Expansion programme funding has been agreed, or in the process of being agreed to create: -

* 1,003 new wraparound childcare places
* 684 new under 3 early years places

6.2 The tables below set out the number and value of applications received, along with the district these relate to.

**Capital funding allocations**

|  |  |  |
| --- | --- | --- |
| FEEE1W Capital | Total places created | Funding committed/ spent |
| Basildon | 35 | £19,460 |
| Braintree | 42 | £145,500 |
| Brentwood | 16 | £46,500 |
| Castle Point | 145 | £448,000 |
| Chelmsford | 22 | £31,000 |
| Colchester | 22 | £61,500 |
| Epping Forest | 164 | £344,500 |
| Harlow | 40 | £122,500 |
| Maldon | 50 | £153,558 |
| Rochford | 0 | £0. |
| Tendring | 77 | £200,220 |
| Uttlesford | 71 | £227,430 |
| **Totals** | **684** | **£1,800,168** |

|  |  |  |
| --- | --- | --- |
| WA Capital | Total places created | Funding committed/ spent |
| Basildon | 55 | £107,000 |
| Braintree | 118 | £198,348 |
| Brentwood | 40 | £150,000 |
| Castle Point | 0 | £0 |
| Chelmsford | 25 | £ 105,469 |
| Colchester | 10 | £99,890 |
| Epping Forest | 0 | £0 |
| Harlow | 50 | £38,500 |
| Maldon | 20 | £ 20,000 |
| Rochford | 0 | £0 |
| Tendring | 26 | £10,715 |
| Uttlesford | 0 | £0 |
| **Totals** | **344** | **£604,453** |

**Wraparound Revenue Funding**

|  |  |  |  |
| --- | --- | --- | --- |
| **Wraparound Revenue** | **Places Created** | **Funding Awarded** | **Maximum Funding Allocated** |
| Basildon | 260 | £60,000 | £180,000 |
| Braintree | 290 | £76,149 | £240,000 |
| Brentwood | 20 | £10,000 | £30,000 |
| Castle Point | 0 | £0 | £0 |
| Chelmsford | 25 | 20,000 | 60,000 |
| Colchester | 140 | £50,000 | £150,000 |
| Epping Forest | 30 | £13,373 | £60,000 |
| Harlow | 108 | £39,221 | £99,663 |
| Maldon | 20 | £10,000 | £30,000 |
| Rochford | 0 | £0 | £0 |
| Tendring | 75 | £42,500 | £122,500 |
| Uttlesford | 35 | £19,000 | £60,000 |
| **Totals** | **1,003** | **£340,243** | **£1,032,163** |

6.4 Throughout this process, the DfE are requiring local authorities to submit regular updates and progress reports on the allocation of funding and creation of new places.

6.5 Next steps

6.5.1 Based on the value of the Capital funding applications received, it is not anticipated that there will be enough funding left for a 3rd round of funding applications. Should any of the schemes not go ahead, this will be revisited.

6.5.2 Wraparound Revenue - the rolling monthly application process will continue

with applications due in for deadlines

* 18 November 2024
* 13 January 2025
* 10 February 2025
* 10 March 2025

These will continue up to this last date or when all funding has been awarded.

6.5.3 The recent school survey responses are being analysed and work underway to match schools with third party providers or offering 1:1 support where this has been requested.

6.5. As previously reported, funding has been ringfenced from the grant received from the DfE to ensure there is financial support for schools and settings for any enhanced staffing levels that may be needed to support children with SEND to access a wraparound place. To date £28k has been awarded.

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

7.1 Table 5 below provides an update on the progress and financial commitment against each of the agreed projects to date. The table below also includes an analysis of the financial benefits as a result of these individual projects: -

|  |  |  |
| --- | --- | --- |
| Proposal | Total Cost | Update |
| Creation of 4 Early Years Early Intervention Partner (EYEIP) full time posts for a time limited period of 24 months, with a possibility of a 1 year extension  All 4 posts in place from September 2023  14 months of funding been utilised to date (£321k) | Total **£550,000** over 2 years | This is the 4th term these posts have been in place for, and we continue to receive positive feedback from settings that are being supported and continuing to see a reduction in the number of funded inclusion applications.  **Benefits of the roles**  The introduction of the EYEIP role, as part of a revised panel process for SEN Premium and Inclusion Funding, has contributed to: -   * A reduction in the number of inclusion funding applications funded between Sept 23 to July 24 when compared to the number of applications funded between Sept 22 to July 23 from 965 to 731, a decrease of 234. * a reduction in funding being paid of £198,862 in those settings where there has been EYEIP involvement in 2023/24, compared to the rate of funding for those settings in 2022/23.   The EYEIP role is a contributory factor to this reduction, as the team are providing practical support to settings rather than them needing financial support in certain circumstances to provide additional staffing levels to enable a child to access their childcare setting. In some cases, this will also help to reassure parents that their children do not need additional staff support to enable them to attend their early years setting, which in turn should contribute to a reduction in the requests for 1 to 1 support.  Due to the impact of the EYEIP role to-date, it is proposed to confirm the third year of funding for these roles from September 2025 until August 2026. |
| 1fte of temporary increased staffing levels to Early Years Sufficiency and Sustainability team  To provide additional business management consultancy and childcare sufficiency staffing support to early years sector for 2 years    £60,000 x 2 years  Increased staffing levels in place from June 2023 –£60k been utilised since June 2023, as this is being allocated alongside the additional financial support provided by the DfE to roll out the Childcare Reforms | Total **£120,000** | This additional resource continues to be in place and, alongside additional funding from the DfE as part of the Childcare Reforms, there are now 4 business management consultants in place alongside the community development resource ensuring each quadrant has its own dedicated support.  The additional capacity has continued to provide support to childcare settings and schools: -   * to apply for the childcare reforms funding, and S106 capital to support the creation of new places * where there has been a need to adjust business models to ensure sustainability * where workforce recruitment and retention issues have required the settings to operate differently at short notice |
| Speech and Language Club  On-line resource by SALT specialists in the six levelling up areas.  Target  Forty-two settings and five hundred children and their families supported through the setting, along with up to ten additional direct support for parents for each setting.  Supplier:  Essex Speech Club.  £78,750 allocated to date | Total **£94,500** | 35 settings are now accessing support across the county. The target was for each setting to support 12 children equating to 420 children for these 35 settings, but settings are continuing to use the interventions across whole groups meaning the reach is far higher than anticipated.  Settings can also identify up to 10 parents to access a targeted home support, and we are seeing more parents taking this support up  *“Parents have shared that they feel they have more of an understanding of what is expected of their child when it comes to communication and how to support those early skills”*  Work is underway this term to roll the programme out to more settings to reach the target of 42 settings and 500 children.  The feedback previously shared below remains and continues to be extremely positive.  *“It has benefited the adults to sit and observe the children take part in the activities, we have noticed those with speech difficulties being more confident to take part in the tasks which has taken us by surprise because they are usually the ones that shy away from answering questions. We were wondering if it is because the adults in the videos are interactive and use puppets – this has made us reflect on our practice during whole class sessions”*  *“The biggest improvement we have seen in the children is the attention levels”*  The cost to date of £78,750 equates to an investment of £187.50 / child for the initial target of 420 children, but the number of children reached by this initiative is at least double plus the number of parents now accessing support shows this to be a very low-cost early intervention.  Additional long-term benefits will be: -   * A reduction in children being referred to Speech and Language therapists where there are lower level speech and language needs * Increased confidence in the early years workforce which will improve the early intervention support provided to support early language development |
| Continuation of Speech and Language Club following a 1-year review  Should the project show success, a further 2–3-year funding, continuation and expansion of the Speech and Language Club. Potential for collaboration with Health colleagues and/or the High Needs Block. | Total **£350,000** | A full audit of the impact on the first tranche will be undertaken in the Spring 2025 term, with plans to roll this out further from April 2025 to be reviewed and agreed based on the evaluation and impact of programme. |
| Help for sufficiency of disadvantaged EY settings.  Funding for Early Years settings in levelling up and disadvantaged areas to help provide sufficiency and longevity in tough times. The settings would be distinguished through location, and if the setting is the only option for families in the area to access their funded place.  Funding implemented from start of Autumn 2023 term | Total **£750,000** | To-date thirteen settings have been supported with a sufficiency grant to provide financial support to overcome short term cashflow issues and / or time needed to amend business models to become sustainable.  This funding source is only considered when all other options have been exhausted  £260,000 committed so far – this investment has ensured that circa 475 early years places have continued to be available, and as early years places often have more than 1 child accessing them over the week more than 500 children will have also been able to continue to access a childcare place and FEEE where age appropriate for the child. |
| Talk listen and cuddle is a platform for parents that provide information, advice and guidance. Potential to offer improvement and expansion of this platform and to allow access to more parents. | Total **£50,000** | Mackman Agency has been successful is securing this work. An initial meeting has been undertaken with them on the roll out of the improvement of the platform and reach to more parents to begin from the Autumn term  Funding will start to be committed from September over a 3 year period with £20k scheduled to be paid for the Autumn term  This work is underway with a focus on reaching more parents to support them to help their children’s learning, with a focus on early language development.  It is too early to provide any impact on this work at this time. |
| Recruitment and retention support  Work underway to put together a package to support the early years sector  Access to free access to ECC Jobs site from September 2023  Marketing Recruitment Campaign launched 4 October 2023 | Total **£300,000** | Targeted 11 month marketing campaign launched - **#‘Make a change. Build a future.’** [https://www.essex.gov.uk/news/2023/new-recruitment-campaign-launched-early-years-practitioners](https://eur02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.essex.gov.uk%2Fnews%2F2023%2Fnew-recruitment-campaign-launched-early-years-practitioners&data=05%7C01%7CCarolyn.Terry%40essex.gov.uk%7C4ef67ac466f740c0d52c08dbc4ef39e3%7Ca8b4324f155c4215a0f17ed8cc9a992f%7C0%7C0%7C638320303970276321%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=pyr%2BgjgVoyJw0FuRuj2pDRdOvYnIpMynBxVoCYxiEeY%3D&reserved=0)  The Make a change. Build a future campaign aims to:   * raise awareness of early years and childcare as a career option, while promoting training routes and progression opportunities * encourage qualified Level 2 and Level 3 practitioners to return to the sector. * raise awareness of the flexibility and opportunities available for those interested in becoming a registered childminder in Essex.   A full analysis has been undertaken into the campaign and all targets set have been met and actually exceeded in most areas. High level summary set out below: -   * Paid media significantly enhanced the campaign’s reach, engagement and awareness, allowing us to target our audiences more effectively and increase visibility. * In total, from 13 October 2023 to 31 August 2024, paid digital ads across all platforms achieved 6,967,240 impressions, 116,240 clicks, 2.34% average click-through rate (CTR) and £0.38 average cost-per-click (CPC).\* * The paid click-through rates far exceeded the industry standards across all audience groups and platforms. * The cost-per-click was far below the industry averages for all three platforms, providing great value for ad spend. * The campaign successfully increased the number of likes on the ECC Early Years Facebook page from 337 to 1,720, gaining 1,347 new likes and exceeding our target of 1,057 * Throughout the campaign, pageviews for the [general landing page](https://eycp.essex.gov.uk/discover-or-return-to-a-career-in-early-years-and-childcare/) rose to 32,444 far exceeding our target of 4,500 pageviews. * The [childminding landing page](https://eycp.essex.gov.uk/discover-or-return-to-a-career-in-early-years-and-childcare/becoming-a-childminder/) achieved 25,552 pageviews during the campaign, significantly surpassing our target of 600 pageviews. * The campaign drove 25,206 pageviews to the [early years jobs landing page](https://www.essexschoolsjobs.co.uk/Vacancies/SearchResults.aspx?Position=Early%20Years). However, due to limitations with tracking direct traffic on the search results page on the website, we are unable to account for other forms of traffic such as organic and referrals.\* * 358 early years providers have registered on the Essex Schools Jobs website during the campaign period. This is an increase of 1093% and a total of 45% of all Essex group provision. Our initial target to register 200 providers by December 2023 was also exceeded. * The campaign encouraged 387 early years vacancies to be advertised on the Essex Schools Jobs website. This includes 297 early years roles in private, voluntary and independent (PVI) settings and 90 nursery positions in schools. * Promotion of the Essex Schools Jobs website, supported by the campaign, led to 385 applications being submitted for advertised early years vacancies. * 21,324 visits to our targeting ‘becoming a childminder’ section – average of 592 per week. In this period there has been an increase in the number of new childminders registered, and of these 64 have also accessed the DfE start up grant funding   Work is underway to build on these successes for a 2nd campaign.  Spend to date.  Recruitment Campaign - £98,000  Job site access - £24,000 |

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

8.1 The Schools Forum Early Years and Childcare Reference Group has continued to meet during 2024, with ongoing representation from all early years’ sector types and each district.

The key areas of discussion have continued to be around the increasing level of need of children and recruitment and retention of qualified staff.

The recent announcement in the Budget to increase the minimum wage will add to the financial pressures the sector is facing and is likely to have further significant impacts on early years settings.

With the national living wage rising to £11.44 per hour from April 2024, and a high percentage of the early years’ workforce being paid at the national living wage level, early years providers will face higher wage bills.Staffing costs already account for a large portion of their expenses, so this increase will put additional financial pressure on settings.

Many early years providers are already struggling with financial pressures, and the wage increase could exacerbate these issues. The DfE have not yet shared the Early Years Block allocations for the 2025/2026 FY with LAs and these are not expected until next month, but without corresponding increases in funding levels, some providers may find it difficult to remain viable.

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

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 6** |
| Date: 27 November 2024 |  |

Any other business and feedback from associations and other Forum members

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 6a** |
| Date: 27 November 2024 |  |

**Joint Finance Review Group / High Needs Review Group**

**Minutes of 5th November 2024**

**Microsoft Teams**

**15:00 – 16:34**

In Attendance

|  |  |  |
| --- | --- | --- |
| Jeff Fair (Chair) (JF) | Ruth Bird (RB) | John Hunter (JH) |
| Sue Bardetti (SB) | Nigel Hill (NH) | Harriet Phelps-Knights (HP-K) |
| Scott Bowak (SBk) | Michelle Steadman (MS) | Claire Styles (CS) |
| Sean Moriarty (SM) | Lydia Sherborne (LS) | Carole Herman (CH) |
| Ruth Sturdy (RS) |  |  |
|  |  |  |
| **LA Officers** | Clare Kershaw (CK) | Ralph Holloway (RH) |
| Andrew Page (AP) | Yannick Stupples-Whyley (YSW) | Gareth Rott (GR) |

|  |  |
| --- | --- |
| 1. | **Welcome and Apologies**  JF welcomed everyone to the meeting.  Apologies were received from Pam Langmead, Rod Lane and Jen Grotier. |
| 2. | **Schools and High Needs Funding**  JF enquired if the DSG Management Plan had been circulated.  CK stated it was not in a ready state to be circulated.  CK responded it was a difficult document but there is nothing in the document that was not discussed at September’s Schools Forum.  YSW introduced the paper setting out the Autumn Statement, the subsequent update from the DfE, the DSG Management Plan and the outcome of the School Funding consultation.  JF stated that his biggest concern was that only 8 responses had been received to the consultation.  CS was also concerned at the lack of response and that schools are not coming along with the LA on this journey or what is happening with finances.  HP-K stated schools do know what is going on and what the process is, but from past experience it does not matter what your view is.  CH added secondary headteachers are kept informed by ASHE Council and local groups. They are informed and know the likely direction of travel but I am too surprised there were not more responses.  HP-K asked how did schools double claim funding. YSW explained that they should have completed the schools census but some also completed the early years census. Schools did not receive any funding they were not due. The Authority held the additional cash in reserve to pay it back to the DfE.  CK provided assurance that action has been taken for the error not to occur again.  JF raised a concern of what the consultation response told us and saying the remaining schools were not engaged. We cannot say that they were wholeheartedly supporting the consultation.  CK agreed that schools were engaged and suggested that we view it as schools not expressing a view.  AP added from the discussions with the DfE it is not a foregone conclusion that the disapplication request will be approved.  SB added that schools do not want a transfer but they know high needs is in a difficult position.  CS asked given what AP had said do we not have enough information from the consultation. RH responded that it will be based on the information in the management plan and our projections going forward.  SM stated with agenda item 3 on the agenda if we are trying to address these issues the DfE will say yes.  RH responded SM is right. If we did not have a plan and just kept spending money without thinking about the consequences the transfer would not be approved. It is about doing things gradually and evaluating the impact just like the inclusion framework.  CK added that the future years are worst case scenario. The DfE has committed to policy reforms around SEND. We need to minimise the level of deficit and prevent accumulation. At the moment it is unrecoverable unless we get central government investment.  SM agreed and said anyone sitting on a Finance Committee or full governors meeting and looking at a 5 year plan. You know because of the work you do; you will never get there.  **Recommendations:**  2.3 To recommend that the secondary maintained member approves de-delegation for 2025/26 at 6.1.  Approved 1, Against 0, Abstained 0  2.4 To recommend that Schools Forum approves the plans set out in the DSG Management Plan at 7.5 to 7.8.  Approved 10, Against 0, Abstained 3  2.5 To recommend that Schools Forum approves the Authority implements the necessary changes shown at 8.1 to meet the requirements of the NFF in 2025/26.  Approved 9, Against 0, Abstained 4  2.6 To recommend that Schools Forum agrees the 1% transfer from the Schools Block to the High Needs Block in 2025/26, subject to the final decision of the Secretary of State.  Approved 11, Against 0, Abstained 2 |
| 3. | **Inclusion Framework, Evaluation and Next Steps**  CK introduced the report.  RH commentated it will have a cumulative benefit. It may take 2 to 3 years to begin to gain trajectory.  JF stated it always takes time to get things going and asked if there were any comments or questions.  CK added that it is now enabling us to have schools that are more adept at meeting children’s needs and how we spread learning. We are creating a mainstream education system that is able that is able to meet more need.  **Recommendation**  2.1 To recommend that Schools Forum agree the continuation of the Inclusion Framework approach as-is, and to receive a further impact report at the end of the academic year 2024-25  For 13, Against 0, Abstain 0 |
| 4. | **Update on Banding**  RH sought the views from members of the proposal to delay implementation of banding for mainstream schools to September 2026.  Banding has been agreed for 230 schools, but there are 91 schools that have not submitted any evidence and 177 where banding is not in a position to be agreed.  HP-K agreed that implementation should be delayed. There is a lot of Christmas coming up for primary schools, so it will be impossible to do anything this term.  CS remembered the last time schools had to do rebanding. It is a massive undertaken and I am in favour of not breaking staff. The more notice that can be given will allow more clarity to be shared.  SB stated it will be better to wait.  JF stated we do actually need to try and make sure that that we have a clear understanding and the schools have a clear understanding actually. This is one of the things that for the for the benefit of the whole of the school population. We need to actually be starting to move towards introducing this into schools and we need to do it properly.  **Recommendation**  2.1 Do we support delaying implementation of mainstream banding until September 2026  Yes 13, No 0, Abstained 0 |
| 5 | **Falling Rolls Fund**  YSW introduced the report.  JF commented we have 3 distinct types of schools, two that meet the criteria, one where the Trust pools balances and one school that is appealing.  NH commented at the moment we are within budget, but some of the numbers that are projected for years ahead get huge. Although we have got this criteria at the moment that we are sticking to, which I totally agree with. I just wonder whether we are going out of budget at a later point.  YSW commented it is hard to answer. For the two new schools recommended it will depend on the October 2024 census which could decrease or increase the allocation for next year. We also have a number of schools that need to increase their NOR year on year. We get an allocation for the falling rolls fund from the DfE and there is a surplus that can be used in the Schools Block if expenditure is higher than the allocation.  HP-K commented we have heard a lot about academies with huge balances, and I am just wondering what more work has been done with these academies that we are talking about. Suddenly they pool their resources and then when it suits, they can give us a clear individual schools balance. That is fine, but I just worry that we may be missing something. To help us make the right decisions or not, because it suddenly, as has just been said, a lot of money that we are having to stump up for these schools and I do not want to see any school going into a deficit budget, but similarly we don't want to be spending if there's money in that trust already that they should and could be using.  SM commented I just really want to echo Nigel's concerns. Basically, as the two schools refer to in this report, which we're not actually proposing, to take any action for at the moment, the total to take out of the falling Rolls Fund is about £450,000 in 25/26, and if you compare that to where the current level of this budget is, it's going to be, you know, you're going to need a substantial increase. Are any of the schools listed in the 2425 Falling Role Fund going to drop out of the falling role fund in 2526?  YSW responded 2025/26 will be the last year for Prettygate Infants, so they will be coming out in 2026/27. It will only be if a school does not meet the balance criteria or their numbers do not increase.  JH commented that where Trusts pool balances, surely, they must have a policy how they will utilise them.  NH commented one of the things that I supported in terms of this falling rolls was the fact that if it was a relatively small school, it was hard to be able to keep somebody on the books when your numbers were so small. But for a larger school, it was easier to smooth it out with your greater resources. We seem to be having some very big schools with two and three, four form entry, who are in this falling rolls fund and they then take a massive amount. As Sean said, they then take a massive amount of money in order to balance the books. I just feel that there is a little bit of a mismatch there.  JF stated that is something we may want to consider in terms of the criteria.  CK added I just wanted to put a bit of context on Mistley Norman. I can confirm that the Vine Schools Trust did actually want to start considering the proposed closure of Mistley Norman, which Essex County Council objected to on the grounds of sufficiency. I just wanted to be honest that we are absolutely saying that that there is a need for Mistley Norman.  **Recommendations**  2.1 To recommend that Schools Forum approve that Mistley Norman Primary and Dr Walker’s Primary are funded through the falling rolls fund for 2024/25.  Agree 9, Against 0, Abstain 0  2.2 To recommend that Schools Forum approves Holt Farm Infant are added back to the falling rolls fund but that no funding is payable for 2024/25.  Agree 3, Against 7, Abstain 0  2.3 To recommend that Schools Forum approves the funding shown in Table 2 at 5.2.  Agree 10, Against 0, Abstain 0 |
| 6. | **Closing Comments**  JF thanked everyone for their attendance. |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 6b** |
| Date: 27 November 2024 |  |

**School Forum Early Years Sub-group**

**MINUTES**

**Thursday 7th November 2024**

**7.00pm to 8.30pm**

**Via TEAMS**

**Attended**

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

17 attendees – see list below

**Apologies**

* Ashley Wilson & Ruth Edwards - The Treehouse Forestry Nursery and Out of School Club
* Ruth Bird – Schools Forum
* Rod Lane – Schools Forum
* Sam Cottrill – The Colourwheel

**Review of minutes and action log**

* Ofsted inspection complaints – Discussion with Ofsted, outcome constitutes for providers to contact LADO, better to be cautious.
* New online form for providers to register concern to LADO, and feedback instant from LADO as to whether meets the threshold or not.
* One word judgement coming in next year for Early Years providers – along with new framework
* Minutes agreed as accurate.

**Schools Forum meeting feedback – 25th September 2024**

* Paper taken regarding High Needs Block (HNB), forecasting to go to **£3.5m** into deficit this year and the deficit increasing for subsequent years. Proposals going to next SF on allocation of funding going forward.

SENIF this year was coming out of EYB & HNB but agreed will be amended this year to coming out of EYB & EYB underspend and not HNB. Subsequent years will come from EYB only, utilising the EY underspend on a gradual bases for subsequent years.

ECC are recommending a Schools block transfer of 1% (approx. **£11m**) to offset the deficit of HNB – 6 attendees happy to recommend their Early Years representatives on Schools Forum support this recommendation.

**Action** – Circulate extract of Schools Forum paper to group. The relevant item is Agenda Item 2. The relevant sections are 6 and 7.

**Early Years items discussed**

* Govt plans for early years school based nursery and ECC stance on this. Early Years Alliance Schools-based nursery plan opens with first round of funding | early years alliance (eyalliance.org.uk) (Jackie – Walton Preschool)

Feels government is overlooking early years.

Carolyn - Survey come out for schools with falling PAN – long term surplus space

Areas where there is a need for more EY capacity schools can apply for funding.

Schools who apply do need to have endorsement from LA – for sufficiency & that space is long term surplus space.

ECC are currently working with schools who have expressed an interested, most schools would be looking at 2,3 & 4 year old places and term time only.

Childcare Sufficiency assessment is being used to compare with population numbers, birth rate, school places etc and considered as to whether there is a need for further provision.

Schools who apply for funding, will need to undertake a consultation to lower school age with community in area.

Schools & PVI sector can apply for S106 funding.

* ARU Nourishing our Future project- Looking at nutritional value of food. Resources to support providers and parents to have nutritional packed lunches and meals provided. Providers fully involved in research project. 134 already signed up to the project, childminders have been very proactive. Settings cam can still sign up.

ARU Food project video clip. Kay Aaronricks <kay.aaronricks@aru.ac.uk

<https://www.canva.com/design/DAGNQZxpEmY/vDli1CZypIrRouGPBcu_1A/watch?utm_content=DAGNQZxpEmY&utm_campaign=designshare&utm_medium=link&utm_source=editor>

<https://forms.office.com/pages/responsepage.aspx?id=2sM1X645Mkaawa_C8l0oUpgHZi_IIxlOl5b41Dlpzc5UNlpNVDREMllBQjNHMTJQTDVQTVdLRlc1Vi4u&fbclid=IwZXh0bgNhZW0CMTEAAR2CkFM_M14rntjEaCgKHu430OIv-bBhdkaONtoPaNYRxP_YFUf6RWA8JHM_aem_XMR9dipXLWIingSLE4o79g&route=shorturl>

**Early Years Updates**

See slide deck attached to minutes

* Transition passport review – Zanya Sesay (EYEIP)

**Carolyn** - Undertaking work with providers in Colchester, feedback transition passport too big and not as useful as it could be. Considering adjusting the information and data in the current passport.

**Helen** – created own one page passport. Reception teachers have said to not have time to read full ECC passport. Happy to work with ECC on revised passport. Years ago, schools used to supply their own form for providers to complete.

**Michele** – If school visit or phone call made, no paperwork completed, otherwise complete ECC passport if this does not happen or if a school does not engage.

**Maggie** – Undertake speed dating evening, schools informed booklets not time to review. More useful to have a visit or chat if needed.

**Ferliene** - We have found face to face meetings or telephone conversations to be much more valuable.

**Linda** – Some schools like and some have not read even though have completed passport. Would support shortened version.

**Jackie** - It feels sad that the schools do not value the input that early years provide and are dismissive of our contribution

**Laura** – Have had mixed reviews. Worked with new feeder school, requested passport end of summer term and contacted setting to ask for further advice if needed to meet needs of child. Agree ECC passport lengthy and time consuming, time booked out for staff to complete. Not had feedback from feeder schools saying not reading. It is good to capture parents voice though as well as one page profile.

Is it worth asking schools and school sencos what is relevant to them, what information do they want to know and in what depth.

**Gaynor** - We have many SEND children so are already sending over one plan to save duplication we do not use them for these children.

**Angie** – Used passport from beginning. Meeting held at beginning between schools and providers to see what was useful. Condensed version was created but does not appear to have been implemented. Have now created own version. Happy to discuss further with ECC.

**Action** – EY Sub-group members to reach out to own feeder schools and feedback at next meeting

* Budget – not discussed at meeting
* Childcare reforms – not discussed at meeting - Funding allocations for Wraparound and EY places on slides
* School based nursery funding – covered above
* Recruitment & Retention – Analysis of 1 year of campaign completed. Raise awareness and level of social media exposure has been successful. Agreed to have 2nd year free to access advertising on recruitment site.
* SENIF update – feedback SENIF on-line form – Jen request

Simple and easy to complete.

**Maggie** - Not sure what information asking for in some of questions, bit ambiguous.

* Update on EH needs assessment

**Carolyn** – Discussed current position of backlog for EHNAs and asked for feedback

**Angie -** Child deferred so still with EY setting still waiting for assessment, Dec application. January application had assessment in August by private education phycologist.

**Yannick -** Company looking at 900 backlog of applications. New applications are being reviewed by usual LA process.

**Laura –** Parents frustrated at lack of communication of who caseworker is, especially when parents have been waiting for such a long time.

**Gaynor -** What is the time frame on the 900 we have a child who has deferred. We have a child who cannot stay with us next term and has no school due to the delayed EHCP. Have spoken to IP. Contact IP again if no outcome informs Carolyn.

**Carolyn –** Going forward reviewing processes to be more effective and efficient. Recruitment of EP is issue as well.

**Yannick –** Working on investment to bring in more assistant EPs

**Items to take to the Essex Schools Forum 27th November 2024**

Paper has already been submitted - Schools base nursery, cost pressure from budget (NI Minimum wage & SSP) & FEEE allocations for next year.

**AOB**

**Maggie** - Is there a deadline to let providers know FEEE rates by for 2025.

LA statutory duty to let providers know by 28th February 25.

DfE allocations due end of November/beginning of December. Planning on taking proposal to January SF meeting for sign off.

**Date of next meeting –** 5th December 2024 7.00-8.30pm via TEAMs

**Future dates –** TBA

**Attendees**

Dawn Saunders Wivenhoe Park Day Nursery

Claire Owers Bright Stars Preschool

Annalei Smith Roydon Preschool CIC

Linda Reynolds Home from Home Childcarers

Gaynor Baker Buzzee Beez Preschool

Tina Carnegie-Dielhem Whipper-Snappers Day Care Nursery

Catherine Hamilton Little Sunbeams Epping

Kelly Stallwood Buzzee Beez Preschool

Ferliene Willis Woodcroft Nursery school

Angie Owen Tolleshunt D'Arcy Pre-school

Helen Taylor Tiddlywinks Preschool

Jackie Popjoy Walton Preschool

Michelle Wisbey Westwood Montessori

Laura Gant Walton Preschool

Maggie Catmull Richmond Preschool

Lisa Rozee Roydon Preschool CIC

Catherine

**Action Log**

|  |  |  |  |
| --- | --- | --- | --- |
| Action | Action for | Date to be completed | Action completed |
| Review terms of reference | Chanel, Helen, Carolyn & Sandie | For first meeting 2025 |  |
| Circulate extract of Schools Forum paper to group | Sandie | With minutes | 8/11/24 |
| Reach out to own feeder schools and feedback at next meeting regarding transition paperwork content | Early Years Su-group members | 5th December |  |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 7** |
| Date: 27 November 2024 |  |

**Schools Forum Meeting Minutes of 25th September 2024**

**held at**

**Hamptons Sports & Leisure, Chelmsford CM2 9FH**

**08:30 – 11:15**

*(subject to forum approval)*

In Attendance

|  |  |  |
| --- | --- | --- |
| Ruth Bird – Chair | Scott Bowak (SB) | Jody Gee (JGe) |
| Jeff Fair (JF) | Carole Herman (CH) | Stuart Roberts (SR) |
| James Saunders (JS) | Nigel Hill (NH) | Liz Gelston (LG) |
| Don Wry (DW) | Marilyn Smith (MSm) | Emily Welton (EW) |
| Claire Styles (CS) | Harriet Phelps-Knights (HP-K) | Natalie Christie (NC) |
| Jennifer Grotier (JG) | Pam Langmead (PL) | Lyn Wright (LW) |
| Rod Lane (RL) | Michelle Steadman (MSt) | Sue Bardetti (SBa) |
| Ruth Sturdy (RS) |  |  |
|  |  |  |
| **LA Officers** |  |  |
| Yannick Stupples-Whyley (YSW) | Andrew Page (AP) | Cllr Tony Ball (TB) |
| Ralph Holloway (RH) | Val Cleare (VC) - Minutes | Helen Lincoln (HL) |

|  |  |
| --- | --- |
| **1.** | **Apologies for Absence and substitute notices**  Apologies were received from Sean Moriarty, John Hunter, Debs Watson, Jinnie Nichols, Clare Kershaw, Robin Taverner, Charlotte Little, Chanel Lassman and Jo Santinelli.  RB welcomed Don Wry (Primary Academy Headteacher), Natalie Christie (Secondary Academy Headteacher), Jennifer Grotier (Special Maintained Headteacher) and Michelle Steadman (Maintained PRU representative) who all joined Schools Forum for the first time today.  RB welcomed Helen Lincoln who was substituting for Clare Kershaw and Pam Langmead substituted for Jinnie Nichols. |
| **2.** | **Schools and High Needs Funding 2025/26 (Jeff Fair/Yannick Stupples-Whyley)**  JF updated Schools on the delay to the provisional funding settlement, of the pressures within the High Needs Block. JF stated this is the first time of looking at this when there is uncertainty in the consultation process to make changes to the formula with a timetable that is unlikely to move.  There are two sections to the paper. Local Authorities will be hoping to maintain progress towards the National Funding Formula. The second part is to add that section of funding where we have no information about the next year’s budget.  There are, however, some knowns. The HNB will be overspent on anticipated funding. There is a lot of discussion at the moment. We looked at the information the Local Authority is putting forward and the reasons why to mitigate the difficulties. JF referred to the Minutes of the Joint Meeting of the Finance Review Group and the High Needs Review Group which was held on 11th September 2024. JF, as Chair, abstained during the meeting. JF stated we do not want to be in any DfE support structure, as funding is insufficient to meet the needs.  JF reported the proposals are not comfortable. Politically in Essex, we have difficulty when school balances total **£184m**. As a Finance Review Group, we have looked at the political reason why money is being held but do not have a reason. JF asked people to come with an open mind about the discussion paper and consultation. What is proposed in the paper is a 1% transfer to try to ensure we do not end up in the DfE process. It is not within the remit of the Schools Forum to make the decision. Please consider the mitigation that the Schools Forum has already put in place to manage the situation. As Schools Forum we have done extremely well to be in a position until just now to look at this. We have planned ahead 15 years ago investing to mitigate to reduce the costs to do work. The capital work is still not fully online.  JF suggested everyone to think carefully and to be wise and aware to be in a position to protect ourselves as schools within Essex to ensure we maintain control rather than being forced into what we should do. There was a lot of concern about moving money. There are some schools with no balances at all, but within the current funding structure there is nothing anyone can do about this.  YSW presented the proposal to the Forum to transfer 1% from the Schools Block to the High Needs Block and sought approval for mitigations from other DSG blocks. YSW spoke about the consultation around the Schools Formula. Whilst the Local Authority is the decision maker, we have to consult with mainstream schools. We are operating in the dark. The provisional settlement is expected after the October Budget statement.  YSW informed the proposals in this paper are all the mechanisms the Local Authority has available to smooth out the Schools Formula to make sure it meets the DfE criteria. The Minimum Funding Guarantee to be set between 0% and 0.5%. Essex uses 0.5% but an option is to lower MFG towards the lower limit. Capping – would have to come to Schools Forum to agree the cap.  YSW reported on the second part of the proposal to transfer up to 1% from the Schools Block. The National Funding Formula does not interact between the Schools Block either. We will continue to work with our local MPs and the DfE to lobby for additional funding. YSW referred to Chart 1 (pie chart) which showed how the budget for the High Needs Block is allocated in 2024/25. Chart 2 showed the same comparison when the last transfer was made. It can be seen that special schools remain at 35% with mainstream increasing by 1%, independent schools by 5% and the funding retained by ECC decreases by 3%.  Table 5 showed historically the previous movements between blocks from 2015/16 to 2018/19. It was noted there have been no movements between blocks since 2019/20.  Table 6 showed the key pressures – Total: **£15m**:  **Top-up Funding Mainstream Schools** – due to an increase in volume of EHCP’s. **£6.2m**.  **Individual Packages of Education Support** – due to an increase in pupils not in a school setting who access education through tuition services within the IPES framework. **£4.2m**.  **Special Schools Top-up** – due to an increase in volume and cost of placements. **£4.1m**.  **Essex Pupils attending other Local Authority** schools – due to an increase in the volume of placements and an increase in cost of placements. **£1.0m.**  **Independent Schools** – due to an increase in cost and volume of placements. **£2.3m**.  **High Needs Block Contingency** – contingency held to offset pressures. **(£2.0m).**  **Contribution to Pension Deficit** – pension deficit contribution for ECC employee posts funded by the High Needs Block is deferred for 2024/25. **(£0.8m).**  Going forward Chart 3 showed that when the original request for a Schools Block transfer was made in November 2018 that there were 8,759 EHCPs. In 2024/25 this has increased to 13,659 EHCPs, an increase of 55.9%. The forecast by 2028/29 is a further increase to 17,042 EHCPs, an increase of 24.8% from 2024.25.  Chart 4 showed the growth in EHCPs between mainstream and special schools. It could be seen the growth in mainstream is at a higher rate than the growth in special schools as the gap between the lines widens.  Chart 5 showed the average cost of Top-up funding for mainstream schools and special schools. Whilst the average Top-up funding is forecast to increase for both mainstream and special schools, the forecast growth in mainstream is significantly higher at 101.4% compared to 22.7% in special schools.  Chart 6 showed the growth in EHCPs between primary and secondary. Primary initially increased at a higher rate in 2023/24. From 2024/25 growth between primary and secondary is fairly even with secondary forecast to grow at a slightly higher rate from 2027/28.  Chart 7 showed the forecast growth in independent school placements. It showed the pressure in actual funding of **£18.9m** in 2022/23 and is forecast to increase to **£76.9m** by 2028/29.  Chart 8 showed the growth in placements for independent schools where it can be seen there is significant growth forecast in 38 weekday places.  Chart 9 showed the average cost of independent places which are increasing due to inflation and the increasing complexity of children.  Chart 10 showed the forecast growth in cost for pupils with EHCPs accessing IPES provision, increasing up to **£40m** in 2028/29.  Chart 11 showed the forecast growth in the cost of excluded pupils accessing IPES provision.  Charts 12 and 13 showed the increasing levels of fixed term exclusion and permanent exclusions which are contributing to the increase in the cost of pupils accessing IPES provision.  **Financial Implications**  Table 7 showed the forecast High Needs Block position based on the forecast increase in demand, price and the increasing complexity of pupils. We are looking at potentially and overspend of **£2m** deficit after opening with a balance of **(£11.6m surplus),** up to **£353m** by 2028/29.  The Authority is proposing the following actions to reduce the deficit in 2025/26:   * To transfer 1% **(c.£11.6m)** from the Schools Block to the High Needs Block. * To transfer **£1m** from the Central School Services Block surplus balance to the High Needs Block. * To move all expenditure on the Early Years Inclusion Fund from the High Needs Block to the Early Years Block from 2024/25 ongoing. This will not impact on current funding rates, but may impact on funding rates increasing in line with the national increase in future years.   Table 8 represented the forecast High Needs Block financial position including the above proposals. We are looking at a **£24.2m** overspend in 2025/26.  The impact on the transfer not being supported is:   * The Secretary of State will decide as the transfer is above the level Schools Forum can approve. * DfE could invoke the Safety Valve which will require significant cuts and annual School Block transfers. It is common for a 1.5% transfer for Local Authorities with the highest deficit. * The Authority will need to reduce expenditure by reviewing independent school placements. Top-up Funding and Individual Packages of Education Support.   Table 9 showed the level of school balances at the end of 2023/24 financial year for maintained schools and the 2023/24 academic year for academies. The overall level of school balances increased by **£4.2m** between 2022/23 and 2023/24 and have increased by **£55.5m** since 2019/2000, which represents a 43.2% increase.  **How would the Transfer be utilised?**  The Authority will continue to invest **£3.5m** in early intervention strategies through the continuation of the inclusion strategy and outreach.  **Action taken to Address the Overspend**  Schools Forum approved funding for the Inclusion Framework which enables schools to access pre-statutory funding to develop inclusive practice. An update report will be presented to Schools Forum in November.  One example is a secondary school that was awarded **£130,000** to develop inclusive practice within the school. The school has identified that this has prevented **£143,000** additional cost to the High Needs Block to date. This is due to the school being able to meet pupil needs without an EHCP and so this is an annual saving to the top-up funding budget.  Schools Forum has also agreed funding for Outreach. The outreach is focused on meeting needs in mainstream both at SEN Support and at EHCP to prevent escalation to special school; the outreach from PRUs is focused on reducing permanent exclusions.  Table 10 showed that the Authority has invested significant funding in the system. The Authority was due to meet with the ESFA on 10th September 2024 to discuss the DSG Management Plan but also to discuss how the ESFA can support in managing the price and volume demand within the grant allocation. The Authority will seek more information about the Delivering Better Value and Safety Valve Schemes. A transfer is required from the Schools Block to the High Needs Block for all approved safety valve local authorities.  **SEND Strategy**  Our focus is on ensuring that we continue to invest in the SEN system to enable a systematic and long-term sustainability rather than making cuts to individual budgets which may have adverse impacts.  We have invested in a SEN workforce via ECC funding and HNB which allows strategic as well as operational support to schools. We have strong special schools but increased pressure on their physical capacity is making that more challenging.  Our sufficiency plan, due for publication in autumn 2024, will set out our intention to manage special school growth by reducing the numbers of children and young people with lower levels of need over time as we work with mainstream schools to be better able to manage their needs locally. This will enable us to accommodate more children and young people with higher levels of need in special schools.  **Section 11 looked at the timeline of setting school budgets.**  Schools Forum, today, are asked to approve the consultation with schools and to support the request for a 1% transfer.  The consultation will be held with schools between Monday, 30th September and Sunday, 27th October 2024.  Schools Forum will be presented with the results of the consultation and the outcome of the discussion on 5th November 2024 along with the recommendations of the FRG and HNRG. Schools Forum will then decide whether or not to support the 1% transfer.  At the end of November, we will bring to the Schools Forum meeting the outcome of the consultation, the settlement and the outcome of the joint meeting.  Obviously, the 1% transfer is the Secretary of State’s decision.  The DSG final settlement is expected week commencing 9th December 2024.  The normal timetable of financial proposals will be brought to the Schools Forum meeting in January 2025.  Table 11 showed the **estimated** basic entitlement values for 2024/25 and a re-based 2024/25 AWPU for the Teachers’ Pay Grant (TPG) and the Teachers’ Pension Employer Contribution Grant (TPECG). The 2024/25 allocation is increased by an estimated 1.5% to calculate estimated values for 2025/26. The Schools Core Budget Grant that has been announced for the Teachers’ pay increase from September 2024 will also be included in DSG for 2025/26 but is not included in these figures as the allocations have not been announced.  Annex A showed the Consultation.  **Questions**  SB asked, does the percentage have to be the same for all categories of schools?  YSW stated, yes. The DfE has spoken about options under a direct NFF, where LAs will be able to choose how the transfer is allocated between phases and types of schools.  SB, but at the moment, it has to be the same for everyone.  YSW responded, yes, but the primary / secondary funding differential will come into play that will allocate more to secondary on a per pupil basis.  PL referred to Table 9 which showed exclusions increasing, e.g. That first year shown was during Covid, and we knew that. That projection looks more gloomier, although exclusions have increased. Concern we are looking at 5-year development plan. Also, these projections, is there any impact to mitigate problems in secondary schools, but escalation to more complex problems, like SEND tribunals etc. There is no magic money tree. But actually, we are looking at the schools budget. We are masking the problem and showing re-purposing. Our High Needs Block is ok, and it is not ok. We should give a stronger message, and argue Essex has done well because we have actually had our own version of austerity, and I hear from primary and secondary schools are scraping by in terms of special educational needs. We are propping up the system for the decisions we are making.  JF confirmed all those diagrams shown that we have a good figure in the one about what we are anticipating for next year. Those figures would go down because of mitigations identified in Tables 9 and 10. You plan on the worst case scenario. But the difficulty is we are always in a system where it is a needs driven system. JF was also very aware of differentials of balances and lived reality compared to what reports actually say.  JF stated, politically, at the moment we have created within the education system a rod for our own backs, because schools are sitting on huge balances than any other sector in Government and it is difficult to justify insufficient funding. There is a political need to highlight and report from ISOS to identify the brokenness of the system, not funding needs. For example, when age range was extended to 25, post 16 sector had insufficient funding.  But it is whatever we are doing, we are highlighting there is insufficient money within the system. We need to make sure the Government system is working. There should not need to be transfer to the High Needs Block. A deficit of **£29m** is a considerable charge to the Schools Budget for next year because we will have to pay interest on the deficit. JF was not sure, when we do not know the political travel, but to protect ourselves as best we can. The Schools Block **£24m** deficit for next year, we have to make sure the school intervention has to work. We are trying to be ahead of the curve as JF mentioned.  PL stated, we know for example, you have some schools in MATs which have no surpluses, but there is a huge amount of money sitting in the system. Of course, there are schools with balances. One of the reasons academies are told, you have to keep a certain amount of money. The whole system is a mess. What PL hears and headteachers report is that on the ground we are making the problem worse because we are taking staff out of schools to support schools. What is happening on the ground in schools and we are privileged in this group, and understand what is happening financially.  SR asked about clarifying “capping.” Is it on basic entitlement or all elements.  YSW confirmed it is all elements.  SR asked if did agree and funding no longer needed and we put in, yes, we would cap it, what happens if we do not need it after funding goes through?  SR stated not all academies are sitting on money and more work needs to be done to address this at Government level. We are making very difficult decisions. YSW stated that if there is no need to use capping the option will be removed.  JG echoed this vociferously. Need to consider implication of getting money from schools. We are hard pressed with budgets. Essex Schools have already survived a pandemic. Many of us just survived. Then there was the RAAC crisis, and we have been disproportionate with this. JG spoke about support staff pay increase, and then the teachers’ pay increase and another shortfall and another deficit to find this year. We are looking at schools to prop up the High Needs budget. JG wanted to know if you have looked at the non-statutory work. We have no other support. You mentioned a school had been awarded **£130,000** for the framework, an unusual situation. Not saving money for the schools. We need to look for doing this. Last time, I had to cull a third of my support staff. The various strategies like inclusion that we have to operate in schools, they are strategies that will be cut. Those jobs will be cut if this happens, looking at those figures. The impact on secondary schools will be devastating and that will be passed on to our children in schools.  RH commented if we ceased the inclusion framework, we would save £1m and outreach save **£2m**, but we are still looking at a huge deficit. Other decisions considered what Norfolk is doing and the table at the start of the paper that the vast majority of HNB goes into mainstream schools, special schools, and independent schools. RH understood the impact on schools but the impact would be on special needs provision in schools if cut. The other factor to consider would need full consultation with parents of children, **£14,000** with balances and **£22,000** with SEND support to cut individual funding. There is no ideal response this year. The risk is the opportunity to look at the forecast in spend, we could spend quite easily if worked strategically. **£80m** can spend but need to have sufficiency plan. Some secondary schools needed to work in a different way and some mainstream schools to work in a different way. The need of children is much more severe than years ago. RH reported he was quite shocked in primary schools recently. Those pressures, if cut, would result in less support.  CS shared something that she would expect the Local Authority would consider. We have a small surplus to balance a 3-year budget and cannot recruit. We have reviewed. We are not investing in any short-term high yield accounts. CS stated she would expect the Local Authority to be encouraging schools, those that do have a surplus, to ensure they have high yield interest in place and call that in to use to prop up financial planning. We will invest that in supporting children. It should be pulled back into prop up financial planning. We will invest that in supporting children. It should be pulled back into the Local Authority to support for the future.  JS echoed those comments. JS also stated he did not have a pot of money that he was sitting on. We are here because there is a threat of the safety valve because we do not have one of those. We want to find a way to maintain control. Do we deserve to maintain control?  Within the last two years we have had discussion about surplus into the HNB and doing that and have been able to claw back into the HNB. Do we have the ability to do this. We have not been maintaining control. Is a safety valve the right things to do? Looking at some of the figures if included in secondary schools, 2 per secondary school across the county **£12,500** and then the AWPU claimed back. If lower down aim to get them back into the mainstream setting. We have a sufficiency plan due to come out. Inclusion framework review but not got the evidence. There are lots of unknowns.  RH explained we are as in control as we can be compared to almost every county. Essex is performing very well but the biggest difference this year is because the growth in numbers with EHCP exceeds growth in the DfE.  We took the decision to do a transfer in 2018. The decision was to reduce and save **£2½m** for the HNB. We have done as much as we possibly can in terms of EHCPs. We are pretty good at managing demand and know we are in control. Independent school costs – we work collectively with the eastern region to manage price. It is not known what the DfE will do this year.  We are in control as much as we can possibly be. We have held off a crisis and now we are in it.  JS informed from his experience the banding is lower.  RH mentioned the average banding has gone up.  HPK asked, are we doing anything?  RH explained we have a robust system for engaging. YSW’s team met regularly. This will fill a void and open up new provisions.  RH – Do I think it is a risk? It is capacity on the secondary school .  Some of previous contractors are not behaving and their costs have gone up.  We have new schools in Essex, i.e. The Greenwell Academy in Harlow, The Hawthorns School and Sir Geoff Hurst Academy, both in Chelmsford, and in Wolsey Park in Rayleigh and South Woodham Ferrers.  Shorefields have increased in numbers. Growth becomes a challenge.  We still have children in mainstream waiting for secondary places.  NS mentioned the schools hit by this are those with inclusive practice. It is not a level playing field. Schools are already at the point of meeting needs; some we will just permanently exclude which will shift the problem somewhere else.  JG asked is the EHCP growth in line with national figures?  RH informed Essex was lower but not now. It is broadly in line. From 2018 to 2028 it will have doubled.  JS asked what is the root cause and are we in control?  RH referred to the pie charts. It is the independent schools looking at 52 placements **£¼m**, and the small reductions 38 week residential, and 38 independent places **£80k, £100k, £250k**.  Many years ago, Essex was asked if this could be look at again and it was brought up at the HNB Group. Also looking at the **£4k+** children in special schools. If looking at independent 4 or 5 schools, there is a disproportionate amount being spent. At Shorefields we now have 298 children on our roll. We are trying to look at how we can grow by 10% or even by 25%. We are looking at properties owned by the Local Authority to see if we can move our sixth form there.  SR felt the overall problem is insufficient funding in the HNB, i.e., the requirement has gone up, but the funding has not.  Table 8 represented the forecast High Needs Block financial position and there was concern about the 1% transfer. We are looking at a **£78k** overall deficit.  AP stated this is only part of the mitigation. We are heading towards the Safety Valve.  PL indicated one of the groups not talked about was parents and what the parental preference would be.  DW reflected on representing primary schools. Essex plan is to increase access to EP’s. There is major concern and how we can help. Is there any mitigation? Can we shift some funding into the process?  RH responded EP is part of the strategy but is not funded from the HNB. It is funded by the Local Authority. We have had extreme difficulty in finding EPs. We have addressed to get EPs. We have a new Strategic Psychologist.  Table 10 showed the Local Authority has invested significant funding and it was noted the Assistant Education Psychologists business case is still to be approved.  RL asked, can you clarify for members at this meeting, the contributions made by health and Care. There are 80 EHCP plans.  RH stated there will be children in independent places, 52-week placements. The Health system is probably in a worse position.  RL suggested that Education is charged disproportionately for providing something other than Education from 9am-5pm.  RH responded only in 52-week placements. 38-week placements are the same as mainstream schools.  RL mentioned the Local Authority picks up the Care cost. However, AP stated we struggle with the Care costs.  JG observed about the 52-week Care, if child is taken into Care and that provision is satisfied, then Education funds the 38 weeks.  AP confirmed the Authority would then make up the 14 days.  HL stated the third funding or 50/50 funding in some cases.  **Recommendations**:   * 2.1 The Forum noted the pressures within the High Needs Block. * 2.2 The Forum agreed the recommendation of the Finance Review Group (FRG) and the High Needs Review Group (HNRG) to support the request to transfer 1% from the Schools Block to the High Needs Block in 2025/26.   **For 7, Against 6, Abstained 7.**   * 2.3 The Forum agreed the recommendation of FRG and HNRG that **£1m** is transferred from the surplus balance of the Central School Services Block to the High Needs Block.   **For 18, Against 1, Abstained 1.**   * 2.4 The Forum agreed the recommendation of FRG and HNRG that all high needs expenditure for Early Years is moved from the High Needs Block to be funded by the Early Years Block from 2024/25 onwards.   **For 19, Against 0, Abstained 1.**     * 2.5 The Forum agreed the consultation paper at Annex A. |
| **3.** | **De-Delegation and Education Functions 2025/26 (Jeff Fair/ Yannick Stupples-Whyley)**  JF had a joint meeting and is recommending the Schools Forum agrees to the recommendations. We have discussed the purposes, and it can be seen our discussions within the meeting agenda. The Local Authority has managed to maintain any cash costs, but it is economy of scale.  YSW reported the Authority’s proposals for de-delegation and education functions for 2025/26.  Table 2 showed the Authority’s proposals for de-delegation for maintained primary schools for 2025/26 for Public Duties and showed the comparison with previous years. Public Duties are where schools can claim for employees who undertake union duties, employees who undertake magistrate duties and for employees who attend jury service. It also enables schools to receive support from the trade unions. The cost is **£1** per pupil, and it is proposed to keep it the same for 2025/26.  Table 3 showed the Authority’s proposals for de-delegation for maintained secondary schools for Public Duties for 2025/26 and showed the comparison with previous years.  **Premature Retirement Costs**  In October 2021 Schools Forum had approved to top-slice funding from the Schools Block, High Needs Block and Early Years Block to fund **£1.3m** for premature retirement costs relating to former school employees.  Table 4 showed the funding top-sliced in 2024/25 and the request for 2025/26.  **Central Services – Education Functions**  It was noted the responsibilities of services provided by the Local Authority are split between:   * Those that are for all schools, which are funded through the Central Schools Services Block, with the agreement of Schools Forum, and * Those that relate to maintained schools only, which are charged on a per pupil basis, with agreement of the maintained school members of Schools Forum.   **Central Services for all Schools**  Following the termination of the Education Services Grant (ESG), the DfE transferred **£3.1m** directly into the Central School Services Block (CSSB) to fund the statutory responsibilities that the Authority has for all schools. The Authority has maintained the amount at **£3.1m** since 2017.18, thus containing inflation. This amount is insufficient to fund the total cost of statutory services for all schools **(£3.5m),** however there is forecast headroom in the Central School Services Block so the Authority proposed to increase the contribution to **£3.3m** in 2025/26.  Table 5 showed the Authority’s proposals for splitting this out for 2025/26.  **Central Services for Maintained Schools**  Following the cessation of the Education Services Grant, the DfE changed the funding regulations to allow Local Authorities to request that the Central Services for maintained schools are funded by maintained schools.  The Authority is maintaining the overall charge at **£2.9m** but due to academy conversions in 2024/25 the per pupil charge increases by **£3.39** (6.9%). The total cost of Central Services for maintained schools is **£3.9m**, so in maintaining the overall charge at **£2.9m** the full cost is not being passed to schools.  There is an income risk to the Authority that future academisation will impact economies of scale and could cause a pressure on Education Non-SG budgets. The authority currently has 211 maintained schools (37.9%).  **Recommendations**   * 2.1 The Forum agreed the recommendation of the Finance Review Group (FRG) and High Needs Review Group (HNRG) that primary maintained members agreed the proposal for de-delegation for public duties at 4.4.   **For 4, Against 0, Abstained 0.**   * 2.2 The Forum agreed the recommendation of FRG and HNRG that the secondary maintained member agreed the proposal for de-delegation for public duties at 4.5.   **Secondary maintained member not in attendance. (Carole decided she did not want to substitute for a governor.)**   * 2.3 The Forum agreed the recommendation of FRG and HNRG that all members agreed to top-slice **£1.3m** for premature retirement costs at 4.7.   **For 20, Against 0, Abstained 0.**   * 2.4 The Forum agreed the recommendation of FRG and HNRG that all members agreed the proposals for education functions funded by the ongoing responsibilities element of the Central School Services Block at 5.3; and   **For 20, Against 0, Abstained 0.**   * 2.5 The Forum agreed the recommendation of FRG and HNRG that all maintained members agreed the proposals for education functions to be funded by maintained schools at 5.4.   **For 6, Against 0, Abstained 0.** |
| **4.** | **Scheme for Financing Schools 2025/26 (Yannick Stupples-Whyley)**  YSW reported to the Forum the proposed changes to the Scheme for Financing Schools for 2025/26 to bring the Essex Scheme in line with the DfE’s updated Scheme.  The DfE has made a number of changes, however Local Authorities are engaging to replicate the scheme.  The Local Authorities are required to publish a scheme for financing schools, setting out the financial relationship between them and the schools they maintain.  The Secretary of State may be a direction review the whole or any part of the scheme from such date as may be specified in the direction.  The proposed changes for 2025.26 are outlined below:  The date of the relevant Schools and Early Years Finance (England) Regulations is updated to 2025.  The 1996 Act is change to the Education Act 1996 to match the DfE updated Scheme.  The 2002 Act is change to the Education Act 2002 to match the DfE updated Scheme.  **Funding Framework**  The section on amending the Scheme has been updated to the revised wording in the DfE updated Scheme.  The wording for Section 50 allowing governing bodies to spend the budget share as they see fit is updated to the revised wording within the DfE Scheme.  **Borrowing By School**  Introduction of IFRS16 which removed the distinction between operating and finance leases and all leases are now classed as borrowing.  **Action: YSW, PL had asked can you check what committed for this?**  The Secretary of State has agreed to provide blanket consent to a range of the most common leasing activities as set out in the IFRS16 Maintained Schools Finance Lease Class Consent 2024. The type of leases allowed are listed for schools.  **Teachers Pensions**  The date of the Teachers’ Pension Regulations is updated.  **Annex A**  All the proposed changes are updating the Scheme based on DfE changes. As there are no Authority proposed changes, it was proposed that the changes are approved by maintained school members without the need to consult with maintained schools.  **Questions**  CS asked is the Local Authority considered in line with the political side.  YSW replied, we do have the ability to clawback balances, however due to the unlevel playing field with academies, we do not do it. We do know how much interest is included in school balances. YSW stated we cannot be sure how many schools use high interest accounts.  SB informed we have tried to do this, but we could not do that.  But it has to be all schools including academies, but you cannot do that with academies.  AP agreed we could bring a decision back here; however, the feeling is this would not be supported.  JF proposed it goes to the Finance Review Group to survey the ability to bring up a proposal back in the next cycle whether to enable the interest to be identified and clawed back into the Local Authority.  JG stated it is within the Local Authority’s control to clawback from maintained schools. In discussions around that if we have schools sitting on really large funds over 20% of their budget carried forward, is there an obligation we need to say something has gone wrong with funding here and what is happening?  CS indicated schools could prevail. If it is invested but the school does not need it, would that school not be duty bound and not entitled?  JG added but looking at the potential to clawback.  JF confirmed as proposed it goes to the Finance Review Group and we will bring it to the Forum after the discussion.  **Recommendation**:   * Maintained school members agreed the changes to the Scheme for Financing Schools for 2025/26 listed at 4.4 to 4.13.   **For 6, Against 0, Abstained 0.** |
| **5.** | **Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies.**  **ASHE**  CH reported the beginning of the school year had brought problems as discussed earlier on in the meeting. People are up against it in terms of budgets and the effects across the county. Specific focus on SEND and inclusion. There are a number of things previously reported which are exercising schools. There have been new regulations brought in on attendance focus for schools across the county and we are getting our heads around the work of attendance officer and the support needed. We are trying to support as best we can.  **EPHA**  PHK mentioned the school budget surplus – 3year deficit.  The start of the term has proved exceptionally busy for primary schools, including getting to grips with a number of changes, to performance management and pay, attendance changes, and a new Ofsted handbook and regime. The delayed start to inspections has been a welcome break for schools, and hopefully the revised arrangements, such as only notifying schools of an inspection on a Monday (in general) will bring some respite to headteachers.  Feedback from headteachers suggests though, that the introduction of the new statutory Working Together to Improve Attendance guidance has not reduced the number of term time holiday requires and schools are really struggling to manage the new expectations of greater support and focus on attendance. Whilst the new templates are forms development by the Local Authority are generally welcomed, it is unrealistic to expect schools to follow all of the suggested strategies; a good example of this is the Essex Pupil Return to School Check In Form, which advises a meeting with every child/ young person returning to school after just one day’s absence. The form is quite lengthy and it is suggested that this is then shared with multiple other staff members: the workload involved with this is simply impossible for schools and is causing stress and anxiety. Other examples include the leave of absence request form, which now asks for a huge amount of information – parents are simply failing to use the form or ignoring much of the information.  Other changes to the system have added to headteacher and school staff workloads: one example, the referral process for ESNEFT Community Paediatrics, is changing from 30th September 2024, where all referrals to the Neurodevelopmental Disorder (NDD) pathway will need to be sent via the child’s school, unless not in education.  Headteachers and school staff can no longer phone various teams for instant advice, such as the Attendance Specialists, who will now only answer communications by email.  The communication and funding in relation to SEND continues to be a problem – there is a real frustration that funding that has been promised I not being distributed swiftly.  We do recognise that all of the services are over-stretched, but schools are finding the increased workload when trying access further support for their vulnerable pupils, extremely challenging.  It was noted the DfE had announced on 24th September 2024 about the early adopters free breakfast club pilot for 750 schools for the summer term.  **ESSET**  JG spoke about primary school outreach leads and there will be one in each quadrant, for example, West are looking after Brentwood. JG was really excited about the outreach. JG is going to EPHA meetings as well. Regarding attendance, we have met with attendance officers. We keep two registers, one of which is the official one. We have talked through each case which is proving quite difficult to administer. The admin time is taken away from the children.  **PRU’s**  MSt felt there were similar challenges with attendance, and we all share these challenges. West is currently experiencing Ofsted. MSt has met with the Local Authority and are looking at funding a level agreement. MSt had a meeting with CH are we are looking at our offering and ensuring 25 mainstream provision and seeing our service does implement behaviour, and children back into mainstream.  Outreach is up and running in the South of the county, working with 30 schools and running education programmes with staff.  **Early Years**  No report.  **ESGA**  CS reported about the administrative burden on governors to do more and society is changing. We are not getting the same people through the door. It is a real challenge. There is a recruitment platform, but it is even harder to get people.  RB informed we are planning for the conference for next year.  **Unions**  MS informed if finances are not in schools, this will impact on our members. Teaching staff and support staff could go through another restructure with redundancies in place. MS stated she has been working in education for 54 years and this current situation is grim. The other concern is changes to the School Meals Service and raise that as a concern but will wait for what the feedback is in the November meeting.  JF reflected from the unions that members are struggling with attendance and requirements of the DfE. We are dealing with a greater number of members who are at this stage under much pressure which is unusual. There is concern long-term that the mis-match in what we see on accounts and on the ground where there is not much money. Teachers are not being paid at the right level and subject to turnover. After 3 or 4 years, teachers will leave the profession. It is like the health service, there would be no staffing crisis, but hundreds of teachers do not want to go back into the system.  **Church Reps**  No report.  **High Needs Review Group** – Agenda Item 2 and Minutes 5a.  **Finance Review Group** – Agenda Items2, 3. Minutes at Agenda Item 5a – on Page 34, RL drew attention to an error to be corrected. On paragraph starting with RL added, second sentence ………… omit “not” to read:  The consultation needs to add the risk if the transfer does happen.  **Action: YSW.**  **Early Years Sub-Group** – Minutes not available.  PL was concerned about representative around childcare funding. Whilst there are around 180 schools either providing morning or afternoon. PL noted quite a few have not got any childcare. Only 12 primary schools have applied for that funding.  PL has asked to meet with Carolyn Terry to discuss funding. There is £6.9m funding and that will be clawed back.  Feedback PL gets from headteachers and schools and understand the DfE criteria. PL added it is almost impossible to meet criteria and the business cuts required is enormous. Rural primary schools do not have capacity to put together that funding objective. Is there any way the Local Authority can support that application process so that schools can apply for that funding?  This was also echoed by DW.  **Any Other Business**  There was one item, RB an CK had received a letter from Saffron Walden Academy Trust concerned that the minimum per pupil level was insufficient to maintain a basic education offer to children. The MPPL is **£4,610** per pupil for Primary and **£5,995** per pupil at secondary. The Trust claimed some schools receive in excess of **£8,000** per pupil. The Trust requested a **£200** increase per pupil in the MPPL.  YSW responded that it is generally smaller schools with a higher per pupil allocation as this is skewed by the lump sum. The MPPL is a national figure set by the DfE that must be implemented by each local authority. The Schools NFF targets funding at deprivation and therefore schools in affluent areas will generally be protected by MPPL. Essex is unable to increase the amount.  PL spoke about Uttlesford in Essex where there is a differential because of depravation. It does not mean they do not have pressures on their schools. We can argue in the least deprived areas there is less support in secondary schools and subject provision. Funding is as it should be. As an Authority we should ensure lease deprived areas are supported. |
| **6.** | **Minutes of 10th July 2024**  One Amendment on page 55, second paragraph to read:  “SR suggested if you included 16-19 funding within the percentage income, it would come down but nothing to change the overall picture.”  **Action: YSW**  The minutes were accepted as a true record of the meeting held. |
| **7.** | **Minutes Action Log (Yannick Stupples-Whyley)**  YSW gave an update and this was accepted. |
| **8.** | **Confidential Minutes of 10 July 2024**  These minutes were approved by all unanimously. |
| **9.** | **Schools Budget and Education Functions Update Q2 2024/25 (Yannick Stupples-Whyley)**  YSW updated the Forum on the forecast outturn position for the year ended 31st March 2024 for both the Schools Budget and Education Functions which was set out in Annex A. The total Dedicated Schools Grant (DSG) was expected to be received for 2024/25 after academy recoupment is **£663.6m**.  The DSG forecast overspend for 2024/25 is **£23.6m**. Table 2 showed the overall forecast DSG balance at 31st March 2025.  The significant variations contributing to the outturn position are:  **Schools Block - £363,000 overspend.**  **Central School Services Block - £322,000 underspend.**  **High Needs Block - £15.0m overspend.**  **Early Years Block - £8.6m overspend.**  In July, the DfE announced the final allocation for 2023/24 which resulted in an anticipated clawback of **£8.5m** as the number of children taking up the free entitlement was lower than the DfE forecast. This will be fully funded by the surplus balance in the Early Years Block.  The Authority has still not received a response from the DfE regarding the overpayment in 2022/23. Therefore **£4.4m** is still at risk of being clawed back. This will also be funded from the Early Years surplus balance.  Table 3 showed the funding Schools Forum agreed at the meeting of 27th September 2023 for the statutory duties the Authority holds for all schools for 2024/25.  Table 4 showed the funding maintained school members agreed at the meeting of 27th September 2023, to de-delegate **£48.59** per pupil to fund the statutory duties the Authority holds for maintained schools for 2024/25.  Table 5 showed the forecast outturn position for Education Functions 2024/25 which is a **£50,000** underspend.  Annex A was the Schools Budget Half-Year Update for 2024/25.  **Question**  CS asked is there any pay progression?  YSW was not aware of this yet. Once we have that information, we will bring it to a future meeting.  **Recommendation**  The Forum noted the forecast outturn position for the year ended 31st March 2024. |
| **10.** | **Forward Plan (Yannick Stupples-Whyley)**  YSW read this out and confirmed the dates of future meetings.  **Recommendations**   * The Forum noted the dates of future meetings. * The additional items as proposed by Schools Forum were included in the Forward Plan. |
| **11.** | **Chair’s Closing Comments (Ruth Bird)**  Cllr Ball stated we are in uncertain times. With the new Government we have duly written and lobbied accordingly. We have also had meetings with the new Members of Parliament with issues about SEND. It is disappointing with the last Government. We are hopeful but the decisions rely on The Treasury. We are doing all we can across all parties to highlight the system.  RB thanked everyone for attending. See you on Teams in November. |
|  |  |
|  | **Next Meeting**  **Wednesday, 27th November 2024 at 8.30 a.m. – Microsoft Teams** |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 8** |
| Date: 27 November 2024 |  |

**REPORT TITLE: Minute Action Log**

Report by Yannick Stupples-Whyley

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date of Meeting | Report | Action Owner | Action | Response | Status |
| 18 May 2022 | Agenda Item 9 – Early Years Update | Carolyn Terry | To bring proposals for allocating the surplus balance to the July / September meeting. | Agenda Item 5 | In progress |
| 18 May 2023 | Agenda Item 2 – Early Years | Carolyn Terry | Cost Benefit Analysis of Underspend proposals | Agenda Item 5. | Complete |
| 10th Jan 2024 | Agenda Item 6 - Confidential Minutes of 29th November 2023 | Yannick Stupples-Whyley | To contact Gareth Honeyford for an update on the School Meals Advisory Service. | Agenda Item 9 | Complete |
| 10th July 2024 | Agenda Item 12 – School and Academy Balances | Yannick Stupples-Whyley | To analyse academy balances by size of Trust | Annex A | Complete |

**Agenda Item 8 – Annex A**

Within Essex there are 100 Trusts, of which there are 43 Trusts with just one school. Of the 43 Trusts with just one school, 37 are standalone academies.

**Table 1** shows the Top 10 Trusts by the number of schools.



**Table 2** shows the Top 10 Trusts by total balances

|  |  |  |
| --- | --- | --- |
| **Trust** | **Schools** | **£** |
| THE SIGMA TRUST | 12 | 8,692,000 |
| THE CHELMSFORD LEARNING PARTNERSHIP | 8 | 7,191,000 |
| AET | 15 | 7,009,450 |
| ALPHA TRUST | 5 | 6,931,572 |
| BRIDGE ACADEMY TRUST | 11 | 6,766,815 |
| ZENITH MULTI ACADEMY TRUST | 5 | 5,816,930 |
| KEYS CO-OPERATIVE ACADEMY TRUST | 3 | 5,094,881 |
| THE DIOCESE OF CHELMSFORD VINE SCHOOLS TRUST | 21 | 4,924,942 |
| BMAT Education | 11 | 3,557,971 |
| SEAX TRUST | 5 | 2,982,134 |

**Table 3** shows the Top 10 Trusts by total balances per pupil.



There is no correlation between the size of Trust and balances held. Whilst some of the larger Trusts do feature within the top 10 total balances, there are also small Trusts in the list.

Looking at balances per pupil the top 3 Trusts have special schools or PRUs in the Trust The Trusts placed 4th to 10th all have mainstream schools.

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 9** |
| Date 27th November 2024 |  |

**REPORT TITLE: Essex School Meals Advice Service**

Report by Gareth Honeyford, Strategy and Development Lead

Contact details: Telephone (03330 013 0429); e-mail: Gareth.honeyford@essex.gov.uk

**1. Purpose of report**

* 1. The purpose of this report is to update Schools Forum on the developments within the Essex School Meals Advisory Service (ESMAS) since November 2023.
  2. This report is for information only and no actions are required.

**2. Recommendations**

2.1 Schools that subscribe to the service should sign and return the revised SLA that they will have just received.

2.2 Schools that do not subscribe to the service could review the offering to consider if it meets their needs.

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

3.1 There are no Schools Forum powers or responsibilities in relation to School Meals as it is no longer a de-delegated service.

###### 4. Background

* 1. The Essex School Meals Advisory Service (ESMAS) is a non-statutory service that provides, cost effective advice and guidance to subscribing schools on meeting their statutory responsibilities on providing safe and healthy school meals to their pupils. The service supports school leaders and their catering managers in understanding and meeting the appropriate regulations relating to nutritional standards, safe food preparation and handling and allergen awareness. The Service does not provide meals themselves or deal with free school meal provision. The Service is valued by Essex schools, especially small schools as they find sourcing appropriate guidance commercially is challenging in a cost-effective manner.
  2. ESMAS (the Service) became a traded service in 2019 having previously been funded directly from the Dedicated Schools Grant (DSG). As a result of the DSG funds being withdrawn, the service altered its model accordingly.
  3. The Council does not have a statutory duty to deliver the Service. It was set up to provide an advisory service to schools who provide meals in house and could not access school meals advice at an affordable price. This includes guidance to school catering managers and school leaders on matters related to food safety and nutrition. The Service delivery model included visits in schools from a dedicated team of advisors.
  4. In recent years, the Service has ceased to cover its costs and consequently continuing with the original service model was not a viable option. Losses incurred in previous years have been mitigated by overall savings made within the Education budget each year.
  5. A substantive price rise of over 60% was proposed and discussed with schools, but an insufficient number of schools accepted the price increase. The Council were unable to continue to offer the Service without an increase in charges or changes to the delivery model as this would have resulted in an annual shortfall of £200,000.
  6. Full closure of the service was considered by the Council. Consultation with the Schools’ Forum and the Essex Primary Headteachers Association (EPHA) indicated there was appetite, particularly from smaller schools, for a modernised digital service at a reduced cost. As a result, the Service was redesigned and re-structured. A digital service has been devised to fulfil school’s requirements and allow for the Service to recover in full the operating costs.
  7. The new digital first service is designed to ensure the long-term viability of the service and open up opportunities to support schools and generate revenue from a wider geographic area. The Service is valued by Essex schools, especially small schools as they find sourcing appropriate guidance commercially is challenging in a cost-effective manner.
  8. The new digital service will use a smaller team that will focus on delivering high quality support and guidance to school catering managers and school leaders on the provision of healthy, safe and nutritious school meals. Advice on allergens, Hazard Analysis Critical Control Point, food safety will be available along with checklists, menus and recipes. This model has a reduced head count and consequently reduced costs. It is anticipated to be at least full cost recovery with some potential for income generation.
  9. The fees and charges for the new digital model will be as follows:
* Small schools (120 or fewer pupils): £600 per annum;
* All other schools (121 or greater pupils): £900 per annum.
  1. In addition to this, in-person visits will be offered as a separate add-on for Essex schools, at £300 per visit. These will occur on request from schools and at the discretion of the Service and will be significantly fewer in quantity than under the old service.
  2. The restructured service has reduced costs from **£286,000** to **£114,000**
  3. There is firm interest at this stage from 128 schools which is expected to fully cover costs in year 1, with further marketing and targeted approaches planned for the spring and summer terms.

**5. Financial Implications**

5.1 To date 128 schools have committed to the new digital offer which will raise **£107,000**.

5.2 The **£7,000** shortfall to cover the costs of the service will be achieved by temporarily reducing the cost of the service as the service manager is providing support to the Schools Crossing Patrol Service until the post is recruited to. During this time 50% of the manager’s costs will be charged to the school crossing patrols budget.

5.3 Fees will be reviewed annually in line with the Authority’s fees and charges policy.

**6. Other Resource Implications**

6.1 Schools that make use of the ESMAS service should ensure that their catering managers have access to a computer, tablet or smart phone.

**7. Consultation with stakeholders**

**7.**1 Since November 2023 informal consultation meetings have taken place confidentially with EPHA to help develop the digital first model.

7.2 The People and Families Policy and Scrutiny Committee have also been confidentially briefed on the shaping of the new model.

7.3 HR and Trade Unions were involved throughout the restructuring process for the team.

**8. Background / Supporting papers.**

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 10** |
| Date: 27 November 2024 |  |

**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**

2.1 To note that no changes are required to membership of Schools Forum.

2.2 To note in Table 5 the members whose current term ends in the next 12 months.

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

3.1 **Table 1** shows the relevant responsibilities that Forum has in relation to the Schools Forum, 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 |
| Membership: length of office – Decides | None – but good practice to get Forum’s view | None |
| Voting Procedures – None | Determines | None |
| Chair of Schools Forum – facilitates | Elects | None |

###### 4. Background

4.1 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.

4.2 At the meeting of 17 May 2023 Schools Forum approved to move the in-person meeting from January to May on a permanent basis. Should an in-person meeting be cancelled the Authority will where applicable change the next remote meeting to an in-person meeting. The usual pattern of meetings is shown below:

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

4.3 All sub-group meetings will be held remotely.

4.4 **Table 2** 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** |

4.5 **Table 3** shows the ratio of pupils between primary and secondary schools as at the May Census 2024.

|  |  |  |
| --- | --- | --- |
|  | Pupils | Ratio |
| Primary | 120,174 | 1.47 |
| Secondary | 83,637 | 1.00 |

4.6 The ratio between primary and secondary pupils is 1.44:1 which requires no change to the number of primary and secondary representatives.

4.7 **Table 4** shows a breakdown of pupils for primary and secondary between maintained schools and academies as at the January Census 2024.

|  |  |  |  |
| --- | --- | --- | --- |
|  | No. of Schools | Pupils | % Split |
| Primary  Maintained  Academies  Total Primary | 198  246  **444** | 51,458  68,716  **120,174** | 42.8%  57.2%  **100.0%** |
| Secondary  Maintained  Academies  Total Secondary | 4  77[[6]](#footnote-7)  **81** | 3,818  79,819  **83,637** | 4.6%  95.4%  **100.0%** |

4.8 The split of primary pupils between maintained schools and academies requires 4 maintained members and 6 academy members.

4.9 A full list of members is shown in Annex A

4.10 **Table 5** shows the members who within the next twelve months will reach the end of their current term of office. Members are allowed to stand for another 4 year term.

|  |  |
| --- | --- |
| Name | Last Meeting |
| Debs Watson | 27th November 2024 |
| Lyn Wright | 27th November 2024 |
| Ruth Sturdy | 27th November 2024 |
| Jo Santinelli | 27th November 2024 |
| Jinnie Nichols | 24th September 2025 |
| Claire Styles | 24th September 2025 |
| Marilyn Smith | 24th September 2025 |

4.12 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.

**5. Financial Implications**

5.1 There are no financial implications.

**6. Other Resource Implications**

**Annex A** - **School Forum Members (November 2024)**

**Maintained Schools:**

**Primary School Headteachers**

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

**Primary School Governors**

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

**Secondary School Governors**

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

**Special School Headteachers**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Jennifer Grotier | Shorefields School | September 2024 to September 2028 |

**Pupil Referral Units**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Michelle Steadman | CSS South | September 2024 to September 2028 |

**Maintained Nursery Schools**

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

**Academies / Free Schools:**

**Primary**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Robin Taverner | St Mary’s Primary, Woodham | July 2022 to July 2026 |
| Rod Lane | Lakelands Primary School | January 2023 to January 2027 |
| Harriet Phelps-Knights | Janet Duke Primary School | May 2022 to May 2026 |
| Liz Gelston | Hatfield Heath Primary | July 2024 to July 2028 |
| John Hunter | Felmore Primary | September 2023 to September 2027 |
| Don Wry | Hearts Academy Trust | September 2024 to September 2028 |

**Secondary**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Ruth Bird (Chair) | The Chelmsford Learning Partnership | January 2023 to January 2027 |
| Natalie Christie | Passmores Academy | September 2024 to September 2028 |
| Stuart Roberts | Shenfield High School | July 2022 to July 2026 |
| James Saunders | Honywood School | November 2022 to November 2026 |
| Lyn Wright | Sigma Trust | November 2020 to November 2024 |
| Jody Gee | Anglo European School | November 2022 to November 2026 |

**Special**

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

**Pupil Referral Units**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Lydia Sherborne | Keys Co-operative Academy Trust | September 2024 to September 2028 |

**Non-School Members**

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

**Annex B**

**School Forum Attendance**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **29th Nov 2023** | **10th Jan 2024** | **10th July 2024** | **25h Sep 2024** | **% Attendance** | **% Attendance incl. Sub** |
| Ruth Bird (Chair) | Yes | Yes | Yes | Yes | 100 | 100 |
| Jeff Fair (Vice – Chair) | Yes | Yes | Yes | Yes | 100 | 100 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 | 100 |
| Jinnie Nichols | Yes | Yes | Yes | Sub | 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 |
| Jennifer Grotier |  |  |  | Yes | 100 | 100 |
| Michelle Steadman |  |  |  | Yes | 100 | 100 |
| Debs Watson | No | Sub | Yes | No | 25 | 50 |
| Harriet Phelps-Knights | Yes | Yes | Yes | Yes | 100 | 100 |
| John Hunter | Yes | Yes | Yes | No | 75 | 75 |
| Rod Lane | Yes | Yes | Yes | Yes | 100 | 100 |
| Robin Taverner | Yes | Yes | Yes | No | 75 | 75 |
| Liz Gelston |  |  | Yes | Yes | 100 | 100 |
| Don Wry |  |  |  | Yes | 100 | 100 |
| Lyn Wright | Yes | Yes | Yes | Yes | 100 | 100 |
| Natalie Christie |  |  |  | Yes | 100 | 100 |
| Ruth Sturdy | Yes | Yes | Yes | Yes | 100 | 100 |
| Jody Gee | Yes | Yes | Yes | Yes | 100 | 100 |
| James Saunders | Yes | Yes | Sub | Yes | 75 | 100 |
| Stuart Roberts | Yes | Yes | Yes | Yes | 100 | 100 |
| Lydia Sherborne |  |  |  | No | 0 | 0 |
| Chanel Lassman | No | Yes | No | No | 25 | 25 |
| Marilyn Smith | Yes | Yes | Yes | Yes | 100 | 100 |
| Charlotte Little | Yes | Yes | No | No | 50 | 50 |
| Jo Santinelli | No | Yes | No | No | 25 | 25 |
| Scott Bowak | Yes | Yes | No | Yes | 75 | 75 |

**High Needs Review Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **26th Feb**  **2024** | **17th June 2024** | **11th Sept**  **2024** | **5th Nov 2024** | **% Attendance** |
| Jeff Fair (Chair) | Yes | Yes | Yes | Yes | 100 |
| Rod Lane | Yes | Yes | Yes | No | 75 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 |
| Harriet Phelps-Knights | Yes | Yes | No | Yes | 75 |
| John Hunter | Yes | Yes | Yes | Yes | 100 |
| Claire Styles | Yes | Yes | Yes | Yes | 100 |
| Pam Langmead | Yes | Yes | Yes | No | 75 |
| Ruth Bird | Yes | Yes | Yes | Yes | 100 |
| Carole Herman | Yes | Yes | Yes | Yes | 100 |
| Ruth Sturdy | Yes | Yes | Yes | Yes | 100 |
| Jennifer Grotier |  |  | Yes | No | 50 |
| Emily Welton | Yes | Yes | No | No | 50 |
| Lydia Sherborne |  |  | Yes | Yes | 100 |
| Michelle Steadman |  |  | Yes | Yes | 100 |
| Scott Bowak / Amanda Thurston | Yes | No | No | Yes | 50 |

**Finance Review Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **13th Nov 2023** | **17th June 2024** | **11th Sept 2024** | **5th Nov 2024** | **% Attendance** |
| Jeff Fair (Chair) | Yes | Yes | Yes | Yes | 100 |
| Rod Lane | No | Yes | Yes | No | 75 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 |
| Harriet Phelps-Knights | Yes | No | No | Yes | 50 |
| John Hunter | Yes | Yes | Yes | Yes | 100 |
| Nigel Hill | Yes | Yes | Yes | Yes | 100 |
| Pam Langmead | Yes | No | Yes | No | 50 |
| Ruth Bird | Yes | Yes | Yes | Yes | 100 |
| Sean Moriarty | Yes | Yes | Yes | Yes | 100 |
| Carole Herman | Yes | Yes | Yes | Yes | 100 |

**Early Years Sub-Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **7th Dec 2023** | **13th June 2024** | **5th Sept 2024** | **7th Nov 2024** | **% Attendance** |
| Chanel Lassman (Chair) | Yes | Yes | Yes | No | 75 |
| Rod Lane | No | Yes | No | No | 25 |
| Ruth Bird | No | No | Yes | No | 25 |
| Maggie Catmull | Yes | No | No | Yes | 50 |
| Helen Taylor (Vice-Chair) | Yes | No | No | Yes | 50 |
| Annalei Smith | Yes | Yes | Yes | Yes | 100 |
| Lisa Rozee | Yes | Yes | Yes | Yes | 100 |
| Linda Reynolds | Yes | Yes | Yes | Yes | 100 |
| Kelly Stallwood | No | No | Yes | Yes | 50 |
| Tina Carnegie- Dielhenn | No | No | No | Yes | 25 |
| Ferliene Willis | Yes | No | No | Yes | 50 |
| Catherine Hamilton | No | Yes | Yes | Yes | 75 |
| Claire Owers | Yes | Yes | Yes | Yes | 100 |
| Michelle Wisbey | No | Yes | No | Yes | 50 |
| Dawn Saunders | Yes | Yes | Yes | Yes | 100 |
| Michelle Boreham | Yes | No | Yes | No | 50 |
| Claire Macklin | Yes | No | No | No | 25 |
| Gaynor Baker | Yes | No | Yes | Yes | 75 |
| Angie Owen | Yes | Yes | No | Yes | 75 |
| Ruth Edwards | No | Yes | Yes | No | 50 |
| Angie Craig | Yes | No | No | No | 25 |
| Anthonia Fasae | Yes | No | No | No | 25 |
| Terri Ewer | Yes | Yes | No | No | 50 |
| Sarah Drummond | Yes | No | No | No | 25 |
| Jackie Pobjoy | Yes | No | No | Yes | 50 |
| Laura Grant | No | No | No | Yes | 25 |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 11** |
| Date: 27 November 2024 |  |

**REPORT TITLE: Forward Plan**

Report by Yannick Stupples-Whyley

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

**1. Purpose of report**

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

**2. Recommendations**

2.1That the Forum notes the dates of future meetings.

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

###### 3. Background

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

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

|  |  |
| --- | --- |
| **Date of Schools Forum** | **Agenda Items** |
| Wednesday 15th January 2025 | DSG Budget 2025/26 (D) |
| (Microsoft Teams) | Third Quarter Budget Update 2024/25 (I) |
|  | Falling Rolls Fund (D) |
|  | DSG Management Plan (D/I) |
|  |  |
| Wednesday 21st May 2025 | Falling Rolls Fund (D) |
| (In-Person tbc) | Schools Budget & Education Functions Draft Outturn Report 2024/25 (I) |
|  | Constitution and Membership of Schools Forum (D /I) |
|  | School and Academy Balances (I) |
|  | DSG Management Plan (D/I) |
|  | Early Years and Childcare Update (I) |
|  |  |
| Wednesday 9th July 2025 | Falling Rolls Fund (D) |
| (Microsoft Teams) | Schools Budget and Education Functions Q1 Update 2025/26, including High Needs Block Update (I) |
|  | DSG Management Plan (D/I) |
|  | Impact of SEND Early Intervention Strategies (I) |
|  |  |
| Wednesday 24th September 2025 | Half Year Budget & Education Functions Update 2025/26 (I) |
| (In Person tbc) | Scheme for Financing Schools (D) |
|  | High Needs Funding 2026/27 (D/I) |
|  | School Funding 2026/27 including school funding consultation (D) |
|  | DSG Management Plan (D/I) |
|  | Impact of Early Intervention Strategies (I) |
|  | De-Delegation 2026/27 (D) |
|  |  |
| Wednesday 26th November 2025 | Early Years and Childcare Update (I) |
| (Microsoft Teams) | School and High Needs Funding 2026/27 (D) |
|  | Inclusion Framework (I) |
|  | Constitution and Membership of Schools Forum (D / I) |
|  | Falling Rolls Fund (D) |
|  | DSG Management Plan (D/I) |
|  | Scheme for Financing Schools (D) |
|  | Schools Budget & Education Functions Update (I) |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 12** |
| Date: 27 November 2024 |  |

**Closing Comments**

Date of Next Meeting – 15th January 2025 (Microsoft Teams 08:30)

1. The original increase for 2024/25 was £1.8bn, however this has grown to £3.9bn as the funding for the teachers’ pay additional grant, the teachers’ pension employer contribution grant and the core schools budget grant are added to the 2024/25 baseline as they transfer to the Schools Block in 2025/26. [↑](#footnote-ref-2)
2. Sparsity funding is on a sliding scale. Primary schools with less than 75 pupils and secondary schools with less than 300 pupils will attract the full amount. Funding then decreases as pupil numbers increase up to 150 pupils for primary schools and up to 600 pupils for secondary schools. [↑](#footnote-ref-3)
3. Reflects Schools Forum decision to transfer £3m expenditure to the Early Years Block [↑](#footnote-ref-4)
4. The savings to ECC\* in each case study is based on £3,000 for processing an EHCNA request. [↑](#footnote-ref-5)
5. An error occurred in the PAN for St John the Baptist Primary, which was not corrected by the school in their return to the Authority. They will be funded for 10 pupils instead of the advised 40 pupils at the July meeting. [↑](#footnote-ref-6)
6. The All-through schools are reflected in the total number of secondary schools but for each all-through school their pupils are split between primary and secondary. [↑](#footnote-ref-7)