

GLOUCESTERSHIRE SCHOOLS FORUM

Minutes of a meeting held on Thursday 18 June 2020

The meeting was held remotely.

Present:

Matthew Bishop	- Primary School Governors (Maintained)
Sara Byrne	- Primary School Governors (Maintained)
David Alexander	- Secondary School Headteacher (Maintained)
Elisa Entwistle	- Alternative Provision Schools
Andrew Harris	- Community Representative (Chair of the Schools Forum)
Kirsten Harrison	- Secondary School Headteachers (Academy)
Kate Hawkins	- Special School Governors
Amanda Horniman	- Early Years Providers
Lisa Jones	- Primary School Headteachers (Maintained)
Gwyneth Keen	- Early Years Providers
Becky Martin	- Special School Governors (Maintained)
David Metcalf	- Primary School Headteachers (Maintained)
Will Morgan	- Secondary School Headteachers (Academy)
Sarah Murphy	- Unions
Alexander Norman	- Secondary School Governors (Academy)
Jacqui Phillips	- Secondary School Governors (Academy)
Steve Savory	- Primary School Headteachers (Academy)
Clare Steel	- Special School Headteachers
Adam White	- Secondary School Governors (Maintained)
Rob Wilcock	- Secondary School Governors (Academy)
Stuart Wilson	- Secondary School Headteachers (Academy)

Observers:

Amber Ludlam, Education and Skills Funding Agency
Cllr Richard Boyles, Cabinet Member for Children's Safeguarding and Early Years
Cllr Patrick Molyneux, Cabinet Member for Economy, Education and Skills

Officers:

Charlotte Jones, Acting Director of Education
Philip Haslett, Head of Education Strategy and Development
Neil Egles, Schools Finance Manager
Suzanne Hall, Finance Business Partner
Joanne Bolton, Democratic Services Officer and Clerk to the Schools Forum

Apologies:

Brian Bartlett, Primary School Governors (Academy)
Penny Chislett, Post-16 Education
Lyn Dance, Special School Head Teacher
Peter Hales, Primary School Governors (Academy)

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Rachel Howie, Gloucester Diocese
Dan Johnson, Primary School Headteachers (Maintained)

44. DECLARATIONS OF INTEREST

No declarations of interest were received.

45. PUBLIC QUESTIONS

No questions from members of the public were received.

46. MINUTES

The minutes of the previous meeting of 9 January 2020 were approved as a correct record.

47. IMPACT OF COVID-19 ON SCHOOL FUNDING

- 47.1 The Forum received an update from Philip Haslett, Head of Education, Strategy and Development, on the impact of Covid-19 on school funding. He confirmed that future funding levels would be protected so there would be no adverse impact on the Dedicated Schools Grant (DSG). The local authority had received additional funding to support schools in relation to Covid-19, and schools were being asked to track their exceptional costs.
- 47.2 The Forum was informed that a total of £500k of the additional funding had been ring-fenced to support vulnerable and disadvantaged children back into education in September. It was anticipated that there would be a spike in the level of need in the system and requests for EHCPs in September, once children returned. A working group had been set up involving headteachers across the sector to look at how this funding could be best utilised to provide support in the system. The working group would look at other effective solutions as an alternative to locking into long-term statutory plans, to address what would hopefully be short-term need.
- 47.3 Some of the headteacher members on the Forum reported significant concerns around the financial loss to schools from the more peripheral incomes, such as income from letting of school premises and from privately funded before and after school provision. Schools were recording exceptional costs in relation to Covid-19, the DfE published guidance stated those to be: increased premises costs; support for free school meals; and additional cleaning costs. There was concern expressed amongst Forum members that those exceptional costs would become more of an issue for schools in September once all children returned, and the additional expenditure was no longer being partially off-set by reduced expenditure in other areas. The Head of Education, Strategy and Development explained that schools did need to record their additional expenditure *and* loss of income so that the true cost of the impact of Covid-19 could be ascertained. In recognition that all schools

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may not be aware of this, he confirmed that he would ensure the message was conveyed to the headteacher groups in his regular briefings with them.

ACTION: Philip Haslett

- 47.4 A Forum member asked officers for clarification on whether schools which had an existing surplus would be permitted to claim for additional funding to meet their increased costs in response to Covid-19. It was felt strongly that schools should not be penalised for holding surplus balances for future planned expenditure. The Head of Education Strategy and Development agreed to seek clarification from the DfE, and report back at the next Forum meeting on 17 September 2020.

ACTION: Philip Haslett

- 47.5 Sarah Murphy, Trade Union, representative, reported that in the context of her work as a case worker, she had received a significant number of emails from supply teachers in Gloucestershire, over the past few months, outlining the difficult circumstances they were facing. Depending on their contract of employment some had been furloughed via agencies, but many had not been in receipt of any pay during the period of lockdown. She urged that schools consider supply teachers when planning work for the Summer/Autumn time.

- 47.6 The Forum was informed that funding levels for Early Years providers were more complex and challenging, due to privately funded places. The local authority had the flexibility to move DSG funding to support sufficiency of places where some places had had to close, but to date had not used this. Gwyneth Keen, Early Years representative emphasised that the resulting loss of income due to Covid-19 had placed a massive strain on the Early Years sector. There was also the risk that take up of places in September could be severely affected as a result of parental concerns concerning Covid-19, leading to even more financial strain, and putting some providers at risk of closure. The Head of Education and Strategy confirmed he would look into this issue.

48. 2019/20 OUTTURN AND MAINTAINED SCHOOL BALANCES

- 48.1 Philip Haslett, Head of Education, Strategy and Development, gave a presentation on the 2019/20 in-year outturn position for Dedicated Schools Grant (DSG), and non-DSG, and the maintained school balances at the end of 2019/20. (For Information: A copy the presentation slides covering each agenda item has been uploaded to the Council's website.)

- 48.2 The Forum was informed that the overall 2019/20 DSG outturn position was a net in-year overspend of £6.716M representing 1.48% of the gross 2019/20 DSG budget. There was a £0.126M Schools Block net underspend, consisting of two elements: an overspend of £0.139M on the growth fund used to fund new schools and increases in basic need places, and an in-year underspend of £0.265M on the de-delegated budgets that relate to maintained schools only.

- 48.3 The dedelegated surplus element of the DSG increased from £0.357M to £0.622M and would be carried forward to 2020/21. The Forum noted the detailed split

across the dedelegated budget headings as outlined in the report. It was reported that although there was an overall net £6.716M DSG deficit being carried forward to 2020/21 this contained surplus commitments relating to the £0.622M maintained schools dedelegated budgets above and also to the Early Years DSG surplus of £1.576M.

- 48.4 It was reported that Early Years finished with a £1.576M underspend in 2019/20. This related to lower than expected payments for nursery education. As in previous years the carry forward would be used to cover the time lagged increases which followed the January census.
- 48.5 The Forum was informed that the overspend on the High Needs Block in 2019/10 was £5.841M and this included the deficit in-year budget of £1.192M. The budget pressures were a result of increases to activity, many of which had been unanticipated and above forecast trends but reflected the national picture. The cost pressures included top ups to support Education Health and Care plans (£2.817M); Independent special schools (£1.713M), and additional special school places (£0.326M); and the Advisory Teaching Service relating to staffing costs (£0.341M).
- 48.6 The Forum agreed that the DSG deficit balance at the end of 2019/20 be earmarked, as shown in the report and carried forward to 2020/21.
- 48.7 The Forum was informed that at the end of the financial year 31 March 2020, 170 maintained schools balances were in surplus, and 33 schools (11 more than last year) were in deficit. The total maintained school balances decreased by £3.814M (-20.0%), made up of: revenue balance decreases of £2.477M (-15.2%); capital balance decreases of £0.663M (-31.8%); and removal of £0.674M of balances relating to four academy conversions.
- 48.8 A summary of the work being undertaken by the Council's Officer Deficit Group to review deficits and excess surpluses, and its work with schools, was outlined in the report.
- 48.9 It was reported that visits had been undertaken to 28 schools with deficit balances, during which a number of common issues arose, including significant capping in the National Funding Formula (NFF), resilience to reduced pupil numbers being low, and class size issues driven by pupil numbers.
- 48.10 The increase in funding to schools in 2020/21 was positive. It was reported that this should see schools reducing and/or eradicating their deficits in the short to medium term. Capping had now been removed from budgets for 2020/21 and this would make a positive difference. An example was given of one small primary school with 50 children, being capped £70k – 25% of the school's overall budget.
- 48.11 The Forum, however, was deeply concerned that the Minimum per Pupil Funding level (MPPF) in the NFF would still lock some of the inequities into the system. The Head of Education Strategy and Development presented an example of a comparison between two schools both for primary and secondary. This set out the

reality of just how significant the variance could be in regards to the amount schools receive per pupil under the MPPF uplift element of the NFF. Schools which had a large number of children with additional needs could receive much less MPPF uplift per pupil than a school which has much lower levels. It was emphasised that this would be an underlying factor in why some schools with a high number of children with additional needs would struggle to balance their budget under the NFF.

- 48.12 In response to a question on what could be done by the Forum to counter the funding inequities, it was reported that the 1 in 40 rule, which the Forum had previously agreed to include as a local element of the NFF, assisted in compensating schools which attracted a disproportionate number of children with high needs. It was also pointed out that the Forum had agreed at the January meeting to move the balance of the Schools Block in 2020/21 to the High Needs block as a one-off contribution. As this issue was not accounted for within the NFF, the Forum acknowledged the importance of the work of the F40 Group, and other lobbying groups, in campaigning for schools to receive a fairer deal - a minimum per pupil funding amount, plus funding for children with additional needs, as part of the NFF.
- 48.13 In response to a question the Head of Education Strategy and Development explained that a range of bodies including the National Governance Association, were involved in the work of the F40 Group, to influence change to the way government allocated school funding.
- 48.14 Suzanne Hall, Finance Business Partner, presented the Children Families revenue outturn report for 2019/20. It was reported that the year end revenue position at March 2020 for non-DSG funded services was an overspend position of £13.979M (12.42% of the budget). As in 2018/19 the overspend was due to higher than expected numbers of external placements and the cost of agency social work staff covering vacancies. To mitigate the overspend an ongoing review of expenditure in Children's Services took place during the financial year.
- 48.15 The Forum was informed that home to school transport was overspent by £0.779M due to the cost and number of short-term routes and the recommissioning of routes where provider contracts had been terminated due to the required service standards not being met. In response to a question, the Finance Business Partner confirmed that there would be associated costs to take account of in the reprocurment of routes if a provider went out of business. The local authority had to ensure that the procurement was of the required standard to ensure the transport was safe, this would increase the pressure on the budget. It was also anticipated that costs to the budget would increase significantly in the current financial year, as a result of SEN transport, and the impact of Covid-19 and the requirements for social distancing.

49. HIGH NEEDS

- 49.1 Philip Haslett, Head of Education Strategy and Development, gave a presentation on the High Needs budget and an update on the High Needs Strategy.

- 49.2 The Forum noted that the overall High Needs budget for 2020/21 was £67,253,100, which meant that a deficit budget would be set of £5,449,200, increasing the High Needs deficit to £14,174,000. The Forum recognised that whilst the High Needs deficit was very concerning, it did however reflect the national picture as many local authorities DSG High Needs budgets were in significant deficit. In common with other authorities a significant part of the overspend had been driven by growth trends in Education Health and Care Plans (EHCPs). There was a total net increase of 324 plans between January 2019 and January 2020. In January 2019 2.1% of the school population in Gloucestershire had an EHCP, this had now risen to 2.3% of the school population.
- 49.3 In response to a question, the Head of Education Strategy and Development clarified that the current in-year cost pressure related to the impact of the full cost of children entering into the system last year. The growth trend would continue unless there was a reduction in the levels of need coming into the system; therefore the budget deficit would remain in future years, mirroring the national picture, unless there was a significant change to the Special Educational Needs Disability Code of Practice 0-25 years, or changes to the funding system so that government funding matched the increased levels of need.
- 49.4 It was reported that there had been a positive reduction in the rates of permanent exclusions, however, this sat alongside a rise in the need for social emotional mental health specialist placements, and in the same period, the number of active elective home education places has risen from 783 to 1,220. The local authority would be looking at a broader measure of outcomes for children who were at risk of permanent exclusion, to determine whether the alternative measures to permanent exclusion were having a positive effect. Officers reported that there was significantly less pressure on places in Alternative Provision than in recent years and this would enable a shift in the focus of the Alternative Provision Service to more prevention support.
- 49.5 A member asked for further data on the numbers of permanent exclusions in 2017/18 and 20/18/19 at mid March, the point at which permanent exclusion stopped due to lockdown this year. She pointed out that whilst it was a pleasing trend the number of permanent exclusions for primary schools had seen an increase to the numbers from last year. The Head of Education Strategy and Development agreed to circulate this data to the Forum. He also pointed out that the figures outlined in his presentation stopped in February due to Covid-19, and were not 'year to date' as stated in his report and presentation.
ACTION: Philip Haslett
- 49.6 The Head of Education Strategy and Development explained that a 5-year recovery plan was being developed and he was confident that the plan would see movement towards a balanced High Needs budget. Officers recognised that the work was premised on the accuracy of forecasting and understanding the growth trends.

- 49.7 A member asked how confident officers were of the key assumption that the proportions of children and young people with EHCPs educated in the mainstream and specialist provision would be in-line with 2019/20, given how critical this assumption was to managing the budget. In response, the Head of Education Strategy and Development assured the Forum that he was confident of this assumption as it was based on the trend data obtained over the past few years. He reported that the proportion of children with an EHCP educated in mainstream over the last few years was approximately 40% and it was expected to stay around that figure. Ultimately the forecasting should now be much more accurate due to a greater awareness overall of the level of need coming into the system, and the true cost of that need.
- 49.8 It was reported that three key factors underpinned the budget recovery, these being: a continued investment in High Needs funding which matched the rising level of need; effective early intervention; reducing the use of more expensive provision; and reducing spend and activity. It was agreed that a group of volunteers from the Forum would be sought to assist in the development of the consultation around reducing spend and activity.
ACTION: Joanne Bolton
- 49.9 The Forum received a detailed update on the High Needs Development Programme. The Forum heard that it was moving in line with the outcomes of the High Needs consultation along two clear paths. The first path was focussed on developing capacity in specialist provision. The second was focussed on transformation work and involved four projects: Spend redesign for SEND & EHCP project; Primary Local Inclusion Clusters project; Secondary Local Inclusion Clusters project, and the Alternative Provision project.
- 49.10 The Forum would receive a further update on the High Needs Strategy at the next Forum meeting in September 2020.

50. ANNUAL REVIEW OF THE GLOUCESTERSHIRE SCHOOLS FORUM CONSTITUTION

- 50.1 Joanne Bolton, Clerk to the Schools Forum, informed the Forum that as part of this annual review of the Constitution, a series of amendments were being proposed in order to update the document. The clerk outlined to members the proposed amendments to the Constitution (outlined by tracked changes at Appendix 1 to the report).
- 50.2 It was reported that the amended Constitution complied with the provisions of The Schools Forum (England) Regulations 2012, and The Schools Forum (England) (Coronavirus) (Amendment) Regulations 2020, which provided that Schools Forums could meet remotely, until 31 March 2021, whilst they were unable to meet physically in a room during the outbreak of Covid-19. It also took account of the advice set out in the Schools Forum Operational and Good Practice Guide (May 2020).

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- 50.3 The Forum agreed to approve the changes to the Constitution document.
ACTION: Joanne Bolton
- 50.4 The Forum noted the letter which had been circulated from Helen Bond, Coordinator for Gloucestershire Parent Carer Forum (GPCF), which outlined the request for a member of the GPCF, to have a seat on the Schools Forum.
- 50.5 The Chair welcomed the request, outlining that it would be useful to have their input particularly in relation to the High Needs aspects of the Forum's work. He suggested that careful consideration needed to be given as to how any potential issues around conflict of interest could be alleviated. It was recognised that whilst there were no provisions within the Schools Forum Constitution which stipulated how an organisation should nominate their members, the GPCF could be asked to consider nominating a representative who did not have a child at a school of any of the current headteachers members on the Schools Forum. Charlotte Jones, Interim Head of Education, provided assurances that the GPCF was a strategic partner of the local authority, and any representative joining the Forum would be aware that they would need to take a strategic view across the whole of the education estate, whilst acting as a representative of the group that nominated them.
- 50.6 In response to a question, the clerk confirmed that there was space for an additional member within the Forum's Non-Schools membership. A question was also asked on whether the balance of representation between primary and secondary members on the Schools Forum was proportionate to the number of pupils in the primary and secondary sectors. It was agreed that the clerk would look into this issue to ascertain whether this was a factor which should be considered when reviewing the membership structure of the Schools Forum.
ACTION: Joanne Bolton
- 50.7 At this particular juncture, it was noted that whilst the meeting was still quorate, a number of members had needed to leave the meeting. As there was a reduced number of members present and in recognition of the wider issues raised around the balance of the Forum's membership, and voting rights, which required further consideration, the Forum agreed to defer making a decision on the request from GPCF until the next meeting on 17 September 2020. An item on this would be included at the top of agenda for the next meeting.
ACTION: Joanne Bolton

51. MEETING DATES 2021

The Schools Forum future meeting dates:

2020

Thursday 17 September at 2:00pm

Thursday 12 November at 2:00pm

2021

Thursday 14 January at 2:00pm

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Thursday 17 June at 2:00pm
Thursday 16 September at 2:00pm
Thursday 11 November at 2:00pm

52. F40

No update was reported.

Chair

Meeting concluded at 4:15 pm