

GLOUCESTERSHIRE SCHOOLS FORUM

Minutes of a meeting held on Thursday 17 September 2020

The meeting was held remotely.

Present:

David Alexander	- Secondary Headteacher (Maintained)
Lyn Dance	- Special School Head Teacher
Elisa Entwistle	- Alternative Provision Schools
Peter Hales	- Primary School Governors (Academy)
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
Rachel Howie	- Gloucester Diocese
Dan Johnson	- Primary School Headteachers (Maintained)
Lisa Jones	- Primary School Headteachers (Maintained)
Gwyneth Keen	- Early Years Providers
Becky Martin	- Special School Governors (Maintained)
David Metcalf	- Primary School Headteachers (Maintained)
Sarah Murphy	- Unions
Alexander Norman	- Secondary School Governors (Academy)
Clare Steel	- Special School Headteachers
Stuart Wilson	- Secondary School Headteachers (Academy)

Observers:

Cllr Patrick Molyneux, Cabinet Member for Economy, Education and Skills

Officers:

Chris Spencer, Director of Children's Services
Charlotte Jones, Acting Director of Education
Philip Haslett, Head of Education Strategy and Development
Neil Egles, Finance Manager, Schools Strategy and Capital
Suzanne Hall, Finance Business Partner
Simon Harper, Head of Democratic Services and Deputy Monitoring Officer
Joanne Bolton, Democratic Services Officer and Clerk to the Schools Forum

Apologies:

Matthew Bishop, Primary School Governors (Maintained)
Cllr Richard Boyles, Cabinet Member for Children's Safeguarding and Early Years
Sara Byrne, Primary School Governors (Maintained)
Penny Chislett, Post-16 Education

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Will Morgan, Secondary School Headteachers (Academy)
Jacqui Phillips, Secondary School Governors (Academy)
Steve Savory, Primary School Headteachers (Academy)
Adam White, Secondary School Governors (Maintained)
Rob Wilcock, Secondary School Governors (Academy)

53. DECLARATIONS OF INTEREST

No declarations of interest were made.

54. PUBLIC QUESTIONS

No public questions had been received.

55. MINUTES

55.1 The minutes of the previous meeting held on 18 June 2020 were approved as a correct record.

55.2 Matters arising from the Schools Forum meeting held on 18 June 2020 – Early Years

55.2.1 Having highlighted the challenges being faced by the early years sector at the June Forum meeting, Gwyneth Keen, Early Years representative gave a detailed account of the severe financial strain the early years sector was now under as a result of the widespread closure of settings during the Covid-19 pandemic. She reported that many early years providers were indicating that they may be forced to close permanently as a result of the financial instability.

55.2.2 The Early Years representative also outlined how the economic and public health consequences of the crisis could deepen existing patterns of vulnerability and under-achievement for young children and families, especially those living in poverty and disadvantage. She reported that early years were a crucial stage for social mobility, with the poorest children already 11 months behind their better-off peers before they started school, and that attending high-quality early years provision provided a vital opportunity to narrow this gap before children started school.

55.2.3 The Early Years representative made reference to the Covid-19 emergency fund for schools, and pointed out that there was no similar funding available for early years providers to claim for loss of income and additional costs incurred due to Covid-19. The Early Years representative questioned whether the Early Years block underspend could be used as an emergency fund to ensure the future sustainability of the sector in Gloucestershire. She stated that she had been asked by a cross section of the sector to formally raise this at the Forum meeting for urgent attention.

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55.2.4 Suzanne Hall, Finance Business Partner, explained that £1M of the Early Years underspend last year was distributed out to providers. It was not yet known whether there would be an underspend this financial year, as it would depend on the number and activities between the autumn and summer term, and the lag that the Schools Census would pick up in January 2021.

55.2.5 Officers agreed to look into whether any underspend could be utilised to fund the infrastructure, or, given that the need had arisen as a consequence of the Covid-19 pandemic, whether there was an alternative funding stream available. It was agreed that officers would consult with the Early Years Forum on the options available, and that an item on Early Years funding would be included on the agenda of the next Forum meeting.

ACTION: Head of Education Strategy and Development.

56. SCHOOLS FORUM MEMBERSHIP

56.1 In response to the queries raised on membership at the June Forum meeting, the Forum received a report which outlined the current membership structure of the Schools Forum, and the balance between maintained primary, maintained secondary and academies members in relation to the pupil numbers in each category.

56.2 The Forum noted that the balance between maintained primary, maintained secondary, and academies members on the Schools Forum, remained broadly proportionate to the pupil numbers in each category. No changes were proposed by the Local Authority to amend the number of members representing those categories on the Forum.

56.3 The Forum considered the request from the Gloucestershire Parent Carer Forum (GPCF) for one of its members to have a seat on the Schools Forum. The Chair drew the Forum's attention to the letter received from the Coordinator of GPCF which outlined that GPCF was a strategic partner of Gloucestershire County Council, and that its aims were to promote good practice, identify need and inform planning processes, and to ensure there were services to support all children with disabilities or special educational needs. The Chair indicated that it would be very useful to gain the GPCF's perspective in the Forum's discussions. The Forum subsequently approved the request; a representative of the GPCF would therefore become a non-schools member of the School Forum.

ACTION: Clerk to the Schools Forum

56.4 It was acknowledged that the induction of the GPCF's representative to the Schools Forum, would include guidance around taking a strategic view across the whole of the education estate whilst acting as a representative of the group that nominated them.

57. SCHOOL FUNDING 2021/22

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- 57.1 Philip Haslett, Head of Education Strategy and Development, gave a presentation on the implications of the government indicative announcements on school funding for 2021/22, and the proposed funding formula method to use for Gloucestershire schools and academies. *(For Information: A copy of the presentation slides covering each agenda item has been uploaded to the Council's website.)*
- 57.2 The Forum noted the 2021/22 indicative Dedicated Schools Grant block summary (the Early Years block indicative figures for 2021/22 had not yet been released). It was reported that at the January 2021 Forum meeting there would be clarity on whether there would likely be any surplus in the Schools block; the Forum would then need to decide on how any surplus could be best utilised.
- 57.3 The Head of Education Strategy and Development presented the changes and clarifications to the National Funding Formula (NFF) for 2021/22, as detailed in the report. The Forum noted that:
- Teacher Pay and Pension Grants were now included in the NFF in 2021/22- £180 per primary pupil and £265 per secondary pupil. They would therefore be in the schools' core budgets rather than paid as separate grants.
 - Minimum Per Pupil Funding had increased to £5,150 per secondary pupil and £4,000 per primary pupil, and then further increased by the teacher pay and pension grants to £5,415 secondary and £4,180 primary.
 - The Sparsity Factor for small and remote schools had increased nationally by over 60%. A total of 30 primary schools and 4 secondary schools received the sparsity factor funding - 9 qualifying primary schools below 70 pupils on roll would receive the full increase of £19k, and all qualifying primary schools below 110 pupils on roll would see an increase of at least £10,000 (the average being £14,781). The 4 secondary schools would receive increases between £2,681 and £7,137.
 - The Income Deprivation Affecting Children Index (IDACI) had been updated from 2015 to 2019 data and adjusted the way that they are assigned – using rank rather than score. Allocations in the DfE's 2021/22 indicative school figures had been updated to include the revised count method.
 - The Split Site Factor has been uplifted by 3.01% for the per pupil amount and 2.97% for the lump sum amount.
 - An additional funding floor protection was included in the formula to ensure that each school was allocated at least 2% more per pupil funding when compared to the previous year's formula allocations - 31% of schools (86 primary and 4 secondary) would be allocated additional funding due to the funding floor.
- 57.4 In response to a question, Neil Egles, Finance Manager, Schools Strategy and Capital, clarified that the additional funding floor protection of at least 2%, would be allocated to schools on a per pupil basis. A reduction in the numbers of pupils at a school would mean that the school would lose the funding connected to those pupil numbers. He explained that the Minimum Funding Guarantee of 1.84% per pupil in the 2020/21 formula was the equivalent of the funding floor protection of 2% per pupil in the 2021/22 formula.

- 57.5 Having considered the NFF factor rates as outlined in the report, the Forum agreed that the basis on which the formula would be allocated for 2021/22, would match the NFF method as closely as possible.
- 57.6 The Head of Education Strategy and Development, explained that on current information expectations were that the growth fund needed for 2021/22 was £1.5M to cover growth in basic need places and start up costs for new schools. In response to a question, the Finance Manager, Schools Strategy and Capital, reported that the amount needed for growth varied each year depending on the type of schools and places needed. It had been forecast that the same figure as 2020/21 of £1.5M would be needed in 2021/22. The growth fund in 2021/22 includes the start up costs of two new schools.
- 57.7 The Forum agreed a top-slice for growth of £1.5M for 2021/22, subject to being updated for any change in the basic need Age Weighted Pupil Unit rates for 2021/22 when those were finalised in January 2021.
- 57.8 The Forum considered the proposals for de-delegations. Sarah Murphy, Trade Union representative, accompanied by Tony Chong, NASUWT, presented the report on Local Authority Teaching Union Facilities 2020. She emphasised the importance of the de-delegation provision for union facilities, explaining that it allowed all primary local authority maintained schools to meet all statutory and procedural entitlements to union representation. The Trade Union representative drew the Forum's attention to Annex B of her report which summarised how the facilities time was spent in 2019/20 by NEU and NASUWT. She explained that without this service schools would individually be responsible for meeting all statutory obligations from their own budget, and she referred to the implications of not buying the service as outlined in her report. She concluded her presentation by stating that she strongly hoped that the Forum members eligible to vote would approve the ongoing de-delegation of union facilities for primary schools. Tony Chong emphasised how vital the service was in supporting the requirements and needs of colleagues, particularly during the Covid-19 pandemic. He stated that feedback received on their work from colleague members, as well as headteachers and deputies, had always been very positive.
- 57.9 The Forum's maintained schools' representatives present at the meeting (by sector) agreed de-delegation at the per pupil rates shown in the report for: In-year increases in pupil numbers – primary; Targeted intervention – primary; Union facilities – primary; Local authorities' duties (primary and secondary).
- 57.10 The Forum was informed that the government had announced a £1 billion Covid-19 catch-up package which was on top of the £14.4 billion 3 year settlement. The first part was a one-off Universal Catch-up Premium (£650M nationally), which would be paid across 3 terms in the next academic year, based on £80 per pupil for mainstream, and £240 per place for specialist provision. The second part to be allocated in the 2020/21 autumn term was a £350M Tutoring Fund, involving subsidised tuition programmes; academic mentors for the most disadvantaged schools; a reception and early language programme; and £96M for colleges and 6th

forms. The Head of Education Strategy and Development emphasised the importance of all schools being made aware of the Tutoring Fund and how to make a claim. It was reported that whilst there had been no guidance as yet from the DfE on how this would be evaluated and monitored, schools would be advised to keep an oversight of how this additional funding was being used and the impact it had had.

- 57.11 The Forum was informed that the total amount of Covid-19 exceptional costs successfully claimed by maintained schools was £441,059, with the primary sector claiming the biggest share (63.7% = £281,145). Funds claimed for increase in premises costs represented the biggest share of the claim (45.5% = £200,901) closely followed by the support for Free School Meals (42.65% = £187,700). Officers explained that whilst the Covid-19 fund claiming period had now closed for 2020, schools were still advised to track their exceptional costs incurred due to Covid-19. The local authority would then be able to determine the overall amount of exceptional costs to schools in Gloucestershire, and be in a position to make an informed claim for any government funding which may become available.
- 57.12 Lyn Dance, Special School Headteacher representative, reported that as special schools were required to remain open during the Covid-19 pandemic, their key concern was the additional cost of using supply teachers to cover staff absences.
- 57.13 The Forum advised officers that if another band of Covid-19 funding for exceptional costs became available to schools in 2021, then the Local Authority would need to provide advice and clarification to schools on whether those, that had accumulated an historic surplus, and that expected to increase that surplus, were eligible to make a claim if they were able to demonstrate that the surplus was earmarked for a future project.
- 57.14 The Forum acknowledged that it would make its final recommendations on the funding formula at its meeting on 14 January 2021, ahead of the submission of the final formula to the DfE.

58. HIGH NEEDS

- 58.1 Philip Haslett, Head of Education Strategy and Development, gave a presentation on the High Needs budget. He reminded members that at the June Forum meeting it was forecast that the High Needs budget in 2020/21 would overspend by £5,449,200 against the High Needs funding allocation of £67,253,100. He explained that the August forecast was currently showing a £306,700 reduction in expenditure compared to budget. A significant element of this was due to reduced costs of Alternative Provision as a consequence of no permanent exclusions during the summer term when schools were closed to the majority of children.
- 58.2 He emphasised the importance of accurate budget forecasting. He indicated that whilst the budget was currently showing a reduction in expenditure compared to budget, this should be treated with a degree of caution, as there would likely be an increase in expenditure in September/October as pupils returned to school.

However, the current indications were that the expenditure would align closely to the planned deficit budget. This demonstrated a good understanding of the trends, enabling accurate forecasting, and the development of strategies to address those key drivers of the overspend.

- 58.3 It was reported that the key driver of the overspend was the number of Education Health and Care Plans (EHCPs), that had continued to rise as forecast. Whilst there was an initial slowing of applications and the process during the early stages of the Covid-19 pandemic, assessments had continued to be received and there were currently 253 open assessments in progress. Officers advised the Forum that those levels were exceptionally higher than forecast and there could be a future impact on the forecast for both special school and independent special school budgets.
- 58.4 There were indications that there could be a marked increase in need concerning children with Social Emotional and Mental Health (SEMH) needs in primary schools, as primary headteachers were reporting that those children in particular were struggling to settle back into school. Consequently, it was suggested that in the near future, consideration may need to be given to increasing the number of special school places for primary age children with SEMH needs.
- 58.5 The Head of Education Strategy and Development acknowledged that the full impact of the Covid-19 pandemic was not yet known, and he confirmed that trends would be monitored carefully over the next few months. He explained that the aim was to avoid increasing the number of EHCPs in the system to address what would hopefully be a short-term impact of the Covid-19 pandemic. Other more effective and timely solutions would be looked at to support children transitioning back to school, rather than locking into long-term statutory plans.
- 58.6 The Head of Education Strategy and Development informed the Forum that an additional £7.515M of High Needs funding for 2021/22 was broadly in line with the additional funding received for the 2020/21 budget, and this did provide confidence of a similar uplift in 2022/23. He explained that just over £1M of the increase in funding was to replace the Teachers Pay and Pension grants, which were now part of the Dedicated Schools Grant allocation. He indicated that he was confident that with the continued rise in funding and the expected savings from the High Needs programme this would go a long way towards achieving a balanced in-year budget. He emphasised however, that if the level of need continued to rise in line with the trends over the last three years, it would still not be enough to bring the budget to an in-year balance.
- 58.7 The Forum acknowledged that in order to further address the challenges, other areas of the High Needs budget would need to be considered within which further savings could be made. The Head of Education and Strategy explained that the following three areas had been identified where savings could potentially be made: An adjustment to the diseconomy of scale model of funding available to special schools; a reduction in High Needs expenditure on the '1 in 40' model to support

schools with high numbers of EHCPs; and a reduction in direct expenditure on the Advisory Teacher Service.

- 58.8 He reported that in regards to the diseconomy of scale model, responses received following contact with the South West Local Authority network, to gain an understanding of models that they used to support smaller special schools, had indicated that they did not provide additional funding in that way. Whilst he recognised the need to support smaller schools, a review and consultation was needed on the existing model to ensure that it was operating as intended.
- 58.9 The Head of Education Strategy and Development explained that the '1 in 40' model was currently in operation to support schools with high levels of EHCPs to address the lack of a 'needs-led' NFF. He advised that consideration was needed on finding a more effective funding model within the confines of the current funding formula, for schools which had a large proportion of pupils with additional needs.
- 58.10 A member raised the point that when the formula moved from the '1 in 75' model to the '1 in 40' model, schools were not fully aware of the significant financial implications this would have on their budget. For secondary schools that had a high proportion of children with additional needs, the detrimental impact on their budget was significant. The Forum urged officers to ensure that consultation on any change to the current model, clearly laid out how any subsequent financial impact would be addressed to ensure there was still fairness contained within the funding allocation to schools that had a disproportionate number of children with EHCPs. It was suggested that this should include looking at how to ensure schools were provided with funding to match the true cost of supporting a pupil with an EHCP. The Head of Education and Strategy acknowledged that a better way forward was needed to ultimately develop a more efficient model.
- 58.11 The Forum was informed that the Advisory Teaching Service was currently fully funded from the High Needs block; the costs had been steadily rising over recent years, due to an increase in staff numbers to support the rising level of need in the system. The intention was to explore and consult on options to reduce the cost of the service whilst protecting the quality and scope of the offer. This could include options to move elements of the service to a traded offer. Some members expressed concern that if the Advisory Teaching Service became a traded service then schools may not buy-in to that service.
- 58.12 In response to a question, it was confirmed that the Advisory Teaching Service came under the 'LA Services and staffing' element of the High Needs block. The overall budget for that element of the High Needs block was £3.9M - the Advisory Teaching Service expenditure was £1.9M.
- 58.13 The Forum agreed that all three areas should be considered as part of the exercise to look into whether potential savings could be made, and where a wider consultation with the school system would be valuable. The Forum would receive further detail on how the potential savings in those three areas could be achieved at its next meeting.

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ACTION: Head of Education Strategy and Development.

58.14 At this juncture, the Chair was advised that the meeting was no longer quorate. It was agreed that as the next two items on the agenda were for information purposes only, and did not require a decision, the meeting would continue.

59. EDUCATION CAPITAL

59.1 Gareth Vine, Universal Commissioning Manger, introduced the report on the annual budget for the 2020/21 Children and Families Capital programme.

59.2 He explained that the overall budget for the programme was £132.355M. The capital schemes were forecast to spend approximately £23.164M in 2020/21. The financial year spend as at the end of August was £3.923M. It was reported that the Covid-19 pandemic had not had a significant impact on the delivery of any of the schemes. The situation was being closely monitored to ascertain whether there would be a greater impact on delivery during the winter months when there may be a second spike in Covid-19 cases, and to also keep under review any potential impact on delivery due to Brexit.

59.3 An update was provided on the following current and future education capital projects across the county:

- Basic Need
- Additional Special Schools Places
- Alternative Provision
- New Social Emotional Mental Health Special School
- Cheltenham Secondary School
- New Free School Bids.

59.4 Members noted the approved Children and Families Capital programme 2020/21 as outlined in the report.

60. F40

60.1 Philip Haslett, Head of Education Strategy and Development, informed members that he had attended a meeting of the f40 Executive Committee on 16 September 2020. He reported that the f40 was making the case in a number of areas to lobby for additional support and funding for schools to cover the additional, unexpected costs as a result of the Covid-19 pandemic. He made reference to the letter attached at Annex C to the School Funding report, from the f40 to DfE, which set out the concerns raised by its members on the impact Covid-19 was having on school and education funding, and suggestions on how they believed those could be dealt with.

60.2 It was reported that the local authority was seeking feedback from schools to gain an understanding of their key concerns regarding the on-going exceptional costs; this information would then be conveyed to the f40 to inform its campaign.

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Chair

Meeting concluded at 4.06 pm