



# Minutes

Name of meeting	<b>SCHOOLS' FORUM</b>
Date and time	<b>Friday, 17 July 2020</b>
Venue	<b>Webinar – Virtual Meeting</b>
Present	Beverley Gilbert – Brading CE Primary (Chair) Noreen Ward – Christ the King College Mike Hayward – Isle of Wight Education Federation David Thornton – Carisbrooke and Newport CEPs Federation (Vice-Chair) Caroline Sice – Lanesend Primary Academy Sarah Hussey – Northwood Primary Academy Fidelma Washington – Isle of Wight College (substitute) Julie Stewart – Medina House School Jackie Boxx – Island Learning Centre Sue Bowen – Church of England Diocese
Officers	Brian Pope – Assistant Director, Education and Inclusion Barry Downer - Senior Finance Business Partner Irina Rowan – Finance Business Partner Tracey Sanders – County Education Manager (Inclusion) Chris Jones – SEN Service Manager Cllr Paul Brading – Cabinet Member for Children’s Services  Diane Hiscock – Clerk
Apologies	Amanda Bitchenor – Chatterbox Day Nursery Duncan Mills – Cornerstone Federation
Observers	Mr Bob Seely – Member of Parliament for the IOW Andrea Latherton-Cassule – DfE Funding Stakeholder Engagement Team Peter Shreeve – NEU Christa Dillyston Laura Augustus – Lanesend Primary Academy Carrie Almond – Lanesend Primary Academy

1. WELCOME AND INTRODUCTIONS

Members, officers and observers were welcomed and introductions made. A meeting protocol was agreed.

2. DECLARATIONS OF INTEREST

CS declared an interest due to the impact on Lanesend Primary Academy of plans for recovery of the High Needs deficit.

### 3. PUBLIC QUESTION TIME

A list of questions received from representatives of Lanesend Primary Academy had been circulated to members prior to the meeting and were noted. Officers had met with representatives of the academy for discussion.

**Action - A full written response will be provided and circulated to forum members over the next week and published with these minutes.**

**Post meeting link - [Questions and Answers](#)**

### 4. MINUTES

#### 4.1 RESOLVED :

That the minutes of the meeting held on [15 January 2020](#) be confirmed.

The meeting planned for 19 March 2020 was cancelled due to the Covid 19 crisis. Papers were circulated and members had been asked to vote electronically on the following -

#### 4.2 [Paper E](#) – Recommendation 2

That schools' forum endorses the proposed local authority approach to early years funding in 2020/21, increasing the rates and implementing option 1 which continues the use of deprivation and flexibility factors.

**11 votes received – all in favour**

#### 4.3 [Paper F](#) – School Funding Policies

Members asked for approval of the annual school funding policy pack

**5 votes, 2 in favour, 1 against, 2 requesting further information/discussion**  
– followed up under Item 10 in this meeting

### 5. MATTERS ARISING – Outstanding from 21 November 2019

- 5.1 (Item 5.1) DT gave feedback on the Future IW programme, which was established to support schools in saving energy and making environmentally-friendly choices, with the help of drone technology. Work carried out on pilot project was not further progressed, but the programme continues working towards the government focus on energy efficiency and sustainability. Further updates will be given as appropriate.

### 6. SCHOOLS AND FINANCE – COVID 19

- 6.1 BP reported on the £1b government 'catch-up' funding for schools. £650m will be distributed to schools and further information is awaited. Officers had successfully lobbied for special schools to be included.
- 6.2 Members were reminded that schools must apply for additional costs associated with the Covid 19 crisis by 21 July. It was noted that the eligibility criteria is prescriptive and claims are unlikely to reach the set limits.

### 7. 2019/20 SCHOOL BUDGET MONITORING AND FUNDING [Paper B](#)

- 7.1 BD reported an outturn for 2019/20 showing a deficit of £1.58m. The early forecast for 2020/21 is from May 2020 and will be subject to change as the year progresses.

#### 7.2 EARLY YEARS

An underspend of £148,000 was due to a reduction in hours for 3 – 4 year olds. The reduction in take up for 3 - 4 year olds will be confirmed from the January 2020 census and is likely to incur a funding reduction of £393,000 for 2019/20.

#### 7.3 SCHOOLS BLOCK

The majority of this funding is passported directly to schools. A higher growth fund was agreed for 2019/20, following returned recoupment after the closure of the Studio School in September 2019. No schools were eligible for growth funding, which led to an underspend of £130,000.

Clarification was requested on the difference from previously reported figures. It was noted that the January report included the full DSG (including academy funding).

#### 7.4 HIGH NEEDS BLOCK

Ongoing pressure has resulted in a £1.87m overspend in the High Needs Block. £131,000 overspend in Early Years SEN funding is a result of identifying special needs (SEN) in children at an earlier age.

Members discussed the level of funding for Education Personal Budgets. It was confirmed that the spend per child is in line with other LAs, although the IOW has a higher proportion of children with Education Health and Care Plans (EHCPs) (IOW 4.6% against National 3.3%). The IOW exercises rigorous analysis for the allocation of EHCPs. Provision for children must be suitable for the severity of need and in the best interests of the child.

#### 7.5 BD gave an overview of budget areas (see [Paper B](#) Appendix C) within the High Needs Block noted in the report, including –

- Discretionary Top Up funding was overspent by £286,000
- Top Up funding in mainstream schools showed an overspend of £184,000 due to increased demand in all areas.
- Increasing numbers of students are becoming eligible for Post 16 Top Up funding, with an overspend of £232,000.
- Over-occupancy at special schools - £103,000 overspend
- Hospital education places - not foreseeable, temporary and resulted in a £30,000 overspend.
- SEN central teams overspend of £117,000 due to increased pressure – includes £25,000 previously agreed by Schools Forum for commissioning support to review provision

#### 7.6 CENTRAL SERVICES BLOCK

An underspend of £27,000 due to low pressure in Non-SEN Independent placements

#### 7.7 OTHER GRANTS

BD confirmed no variance in this area.

#### 7.8 CUMULATIVE DEFICIT AND CARRY FORWARD

The previous deficit of £908,000 brought forward with the current £1.58m overspend amounts to a deficit of £2.488m carried forward for 2020/21. Following consultation, regulations for Dedicated Schools Grant (DSG) funding were amended so that LAs are no longer able to fund any deficit in the DSG. Therefore, Schools Forum approval for carry forward of the deficit is not required.

Previously, LAs with a cumulative deficit of 1% or more would have to produce a recovery plan. The regulations now require that information on the DSG and High Needs Budget is provided to the DfE as and when requested.

BD has joined a group currently working with DfE to produce a template document to support LAs with managing the DSG, which should also assist with future reporting to Schools Forum.

Members discussed how proposed strategies for recovery would be explained to schools. Regular reports will be available at Headteacher Forums.

It was hoped that the additional £14b funding commitment for schools will be targeted towards high needs. Forum members would be willing to form a working party as needed.

- 7.9 Under the statutory [powers and responsibilities](#) Schools Forum may agree a decision to transfer up to 0.5% of the Schools Budget to support the High Needs Budget. Options will be discussed in the Autumn term.

It was noted that the DfE are carrying out a national review of SEN provision aimed at improving services, led by Tony McArdle.

7.10 2020/21 BUDGET – OVERALL FORECAST

The position at 31<sup>st</sup> May 2020 shows a forecast overspend of £801,000 but is likely to be subject to change.

7.11 EARLY YEARS BLOCK

More detail to follow, as a delay in the implementation of the new system, due to the Covid 19 crisis, may influence future variances.

7.12 SCHOOLS BLOCK

The closure of All Saints CE Primary School in August 2020 will result in re-distribution of this funding share between schools.

7.12 HIGH NEEDS BLOCK

A forecast overspend of £794,000 – variants are consistent with last year, along the same themes.

7.13 HIGH NEEDS BUDGET PRESSURE MITIGATION

Continuing pressure due to increasing numbers of EHCPs, above national average (IOW 4.6% against National 3.3%). Block funding at minimum increase level does not match the higher numbers of EHCPs required.

7.14 Attempts to reduce pressure include

- increased scrutiny and challenge over discretionary spend.
- additional 12 places at St George's Special School
- increased resourced provision in maintained schools
- improved SEN support guidance
- new banding system (for consultation)
- review of provision/aspirations of post-16 students – routes to internships and apprenticeships

Increased pressure on post-16 provision is expected following the Covid 19 crisis, and exacerbated through the situation of living on an Island. It is hoped to work with the leisure and hospitality industry and IW College to find opportunities.

An Ofsted inspection of SEN provision on the IOW in 2019, had concluded that the process and thresholds for allocation of EHCPs are rigorous. Research has shown links between higher levels of EHCPs, coastal communities and free school meals (FSM) indices. Historic weaknesses in education are also taking time to work out of the system. The MP has written to ministers on these matters.

Parents should be confident that their child is receiving the best provision.

7.15 CENTRAL SERVICES BLOCK

Budget area on track at present, but is demand led.

7.16 OTHER GRANTS

No variants expected – as majority is passported to schools.

## 7.17 2021/22 SCHOOL FUNDING

DfE guidance for the next year is expected during July/August and consultation on the funding formula is likely to take place in September. LAs are advised to continue to work as closely as possible to the National Funding Formula.

A question was raised around the implications of falling roles and excess school places across the Island. It was noted that overall pupil numbers had risen slightly in the last year. BP explained that Post-16 places had been consolidated, secondary places are consistent with demand and ongoing plans are managing excess places in the West Wight. DfE focus is on the retention of small rural schools.

### RESOLVED :

THAT the outturn position on the 2019/20 schools' budget be noted.

THAT the May 2020 forecast 2020/21 position be noted.

## 8. 2019/20 BALANCES (MAINTAINED SCHOOLS) [Paper C](#)

The 42 maintained schools on the Island showed a cumulative negative balance – a deficit of £272,000. Academies report separately to DfE and have a different financial year.

13 schools ended the year with a deficit budget, an increase of 1 on last year. 1 school came out of deficit and 2 had unexpectedly gone into deficit. Approximately half of schools ran with an in-year surplus and balanced budget.

- 8.1 All schools submitted the revised Schools Financial Value Standard (29 questions signed off by the governing body) on time.

The deadline for submission of budgets was extended to 30 June 2020 to allow schools time to adjust to the changes due to the Covid 19 crisis.

- 8.2 The number of schools in deficit is set to reduce from 13 to 9 by the end of 2020/21 with recovery plans in place. BD gave an overview of funding expectations for the year advised that School Business Managers should have a realistic view when setting budgets, rather than looking at worst case scenarios.

- 8.3 Members were reminded of the requirements that schools must adhere to if setting a deficit budget. BD explained the intervention measures that are put in place where schools are financially 'at risk'.

At least 17 schools have moved back into the LA HR and Payroll service – which contributes to a more supportive and improved system of working together.

A list of school balances is included at [Paper C](#) – Appendix A

- 8.4 Members briefly discussed the intervention strategies for schools where there is a risk of remaining in deficit for more than 5 years. Ultimately, where a maintained school causes concern, the LA can request an Interim Executive Board (IEB) to take over the governing body responsibilities. There is no longer a facility for LAs to clawback large surpluses, but most schools with a surplus are using this to cover in-year deficits. Academy budgets are not overseen by Schools Forum, but it was acknowledged that all schools and academies are taking serious actions to manage financial issues and balance budgets.

### RESOLVED :

THAT the school balances position for the Isle of Wight Local Authority maintained schools be noted.

## 9. IOW SCHEME FOR FINANCING SCHOOLS [Paper D](#) and [Appendix A](#)

The scheme applies to maintained schools and was last updated in September 2018. Recent changes to the Schools and Early Years (Finance) Regulations required minor changes and the IOW scheme has been refreshed to cover basic

housekeeping and responses to Covid 19. Further changes are expected in the next year.

- 9.1 Consultation with schools closed on 14 July 2020 and no responses were received. Members questioned whether Headteachers had fully read and understood the document and if changes should be highlighted. Headteacher representatives present confirmed that they had taken full account of the scheme. It was agreed that minimal changes would be unlikely to incur a response, whereas historically, amendments with wider implications had been subject to more attention.

**RESOLVED :**

THAT the revised Scheme for Financing Schools included in [Appendix A](#), to come into force from 01 September 2020 be approved by maintained school representatives (6 votes – all in favour).

10. **SCHOOL FUNDING POLICIES** [Paper E](#)

As noted in Item 4.3 – members had been asked to approve the school funding policy pack. BD clarified elements of the policy pack that require Schools' Forum decision and those where Schools Forum are able to give a view. Schools' Forum approval is sought in relation to criteria for growth fund and falling rolls funding. The wider policy is brought for information

- 10.1 Members had previously questioned the decision to move SEN Cap Funding to a fixed budget, as part of the wider recovery plan in relation to the High Needs Budget. Schools' Forum was consulted and the LA was the decision-maker in this case.

CS wished it to be noted that Lanesend Primary Academy are likely to see an overall reduction in funding of around £100,000 which would impact on SEN provision.

**RESOLVED :**

THAT the continuation of the existing criteria for growth and falling rolls for 2020/21 be approved.

THAT the wider contents of the policy pack which came into force 01 April 2020 be noted.

11. DfE operational guidance for 2020/21 and indications for high-level funding allocations are expected soon. BD will bring regular updates to Headteacher Forum meetings. Further information will be given at the next Schools Forum meeting – and if necessary a working party can be arranged for discussion on specific focus areas.

The development of a template as noted in item 7.8 will help Headteachers and Schools' Forum members to be more informed regarding the recovery plan.

12. Members were informed that this was NW's last Forum meeting and a note of thanks was given for the work undertaken to secure improvement at Christ the King College. NW reciprocated thanks for the support received during the time she had been on the Island.

**DATE OF NEXT MEETING**

Thursday 12 November 2020 – virtual meeting, from 8.30am

**DATES OF FUTURE MEETINGS**

All at 8.30am

14 January 2021 - Westridge Community Learning Centre or virtual meeting

25 March 2021 – **Please note further change of date** - Westridge Community Learning Centre or virtual meeting