
BURY SCHOOLS' FORUM

MINUTES

of the meeting of Bury Schools' Forum on

Tuesday 20th October 2020

Microsoft Teams Meeting

In Attendance:

Nursery

Rachel O'Neil Headteacher – Hoyle Nursery

Maintained Primary

Emma Moncado Headteacher – St Joseph's RC Primary
Claire Simon Headteacher – Bury & Whitefield Jewish Primary
Martin Van Hecke Headteacher – Whitefield Primary
Simon Waddington Headteacher – Hollins Grundy Primary

Maintained Secondary

Tina Owen Headteacher – Philips High
Joanna Filkins School Business Manager – Elton High
Susan Southworth Governor – Derby High

Special

Helen Chadwick Headteacher - Millwood

Special Academy

Kristie Bloomfield Oak Learning Partnership
Orienne Langley-Sadler Oak Learning Partnership

Pupil Referral Unit

Non in Attendance

Academy

Neville Kenyon Governor – Shaw Education Trust (SET)
Brian Roadnight Headteacher (**Chair**) – Shaw Education Trust (SET)
Heather Standbridge School Business Manager – St Teresa of Calcutta RC MAT
Elaine Turner Head of Finance – Shaw Education Trust (SET)

Non-Schools

Geoff Hirst NAHT
Tony Durack NASUWT
Helena Thom NEU

Children's Services Department:

Julien Kramer Interim Assistant Director for Education & Inclusion
Steven Goodwin Head of Strategic Business & Finance
Alison Vidler Principal Finance Officer (Schools & Systems Finance)
Elissa Reeve Senior Finance & Business Manager (Clerk)

Education Funding Agency (EFA) Observers

Non in Attendance

Observers

Melanie Griffin CLAS

Also in Attendance

Nick Bell Secondary Inclusion Lead
Jane Harrison SEND Project Worker

1. Introductions

The Chair welcomed Forum members to the meeting via Microsoft Teams and introduced Emma Moncado the Headteacher of St Joseph's RC Primary who has replaced Fiona Robinson as a Maintained Primary representative and Tony Durack who replaces Karen Hopwood as the NASUWT representative. Tony Durack is also a teacher at St Gabriels.

2. Apologies for absence

Lisa Corrigan Headteacher – Heather Standbridge represented
Natasha Shears NEU – Helena Thorn represented
Jonathan Wilton Headteacher – Joanna Filkins represented
David Waites Headteacher – Vision MAT
Carina Vitti 14 – 19 Representative

3. Appointment to Chair of Schools' Forum

As an annual decision the Forum were asked if anyone wished to be nominated for the role of Chair of Schools' Forum and if not if Brian Roadnight was happy to continue in the role for another year. There were no other nominations and it was agreed for Mr Roadnight to continue as Chair.

4. Schools' Forum Representation

Steven Goodwin presented a breakdown of pupil numbers split between primary and high and academy and maintained and explained that Forum needed to continually review the mix of representatives to ensure a fair representation of each sector but it was no longer necessary to consider the proportion of Headteachers, School Business Managers and Governors in each sector in the mix.

Therefore it was highlighted that:

- Maintained Primaries have 5 but need 6 representatives therefore plus 1
- Maintained Highs have 4 but need 3 representatives therefore minus 1
- Academy Primaries have 1 but need 3 representatives therefore plus 2
- Academy Highs have 5 but need 3 representatives therefore minus 2

Any representatives that wished to step back from their voting roles could continue to be an observer at the meetings in the future.

The mix for Early years, special schools and the PRU were satisfactory, although Helen Chadwick said she would speak with the Headteacher of Cloughside to offer her the opportunity to become the Maintained Special school representative.

Forum discussed that there should also be a fair mix of Academy Trusts across the split as currently The Shaw Education Trust had a lot of representatives in the high school academy sector. Also it was discussed that if a trust had a primary, high and special school, such as the Oak Learning Trust, it would not be a fair mix to have representatives in each sector when it comes to a full Forum wide vote.

Mr Roadnight will discuss the secondary representation with BASH colleagues and Mr Waddington will discuss primary representation with BAPH colleagues with the aim that the correct mix will be achieved in time for the next meeting in November.

5. Minutes of the last Meeting

The minutes of the meeting held on Tuesday 16th June 2020 were checked and agreed as a correct record of the meeting.

6. Matters Arising from the Minutes (16/06/20)

Page 6 Item d – DSG Recovery

Forum queried if the DfE had made progress with its 'significant review' into High Needs funding and spending and it was confirmed that although there has been some delay due to the current pandemic, the DfE were working hard behind the scenes with the aim that any outcomes following the review may influence the funding from 2022.

a & b) SEND Analysis & Out-Borough Update

Jane Harrison (SEND Project Worker) explained that there are approximately 305 pupils schooled via neighbouring LAs, personal budgets, alternative provision and joint funding with some very high cost placements. Within the 305 there are 124 in the Independent Non Maintained Sector (INMS) which has reduced from 133 last year and 152 the year before which shows a reducing trend.

The LA is looking at Bury's current capacity and skills to enable these pupils to be supported in borough and in the future prevent pupils going out of Bury. The aim is to stop the flow by focusing on early identification and support.

Jane explained that there is an inclusive nature in Bury and the LA wants to include the children and their families in the placement decisions. Purely from a financial side all options need to be considered during decision making process as the same standard of support could be provided by a cheaper alternative which may not be necessarily a parents' first choice.

The SEN panel has been strengthened and there is a lot of work going on to make a more efficient service with early years and early help pathways also involved.

There is a graduated response with the SEN team working with Cath Atherden and Nick Bell in Inclusion and the systems and processes have been updated and streamlined. A pupil is identified at risk and the SEN Caseworkers RAG rate to ensure the high risk pupils are prioritised to prevent the out of borough option. The volume of risk remains steady although it was expected to have reduced but there are different presentations due to the pressures of lockdown. The decision making process is stronger and more robust with a forensic level depth of information used.

The SEN Caseworker numbers have increased with the aim of allocating each school a designated SEN contact. The Caseworkers need to ensure all relevant professionals attend meetings to give the best possible outcome.

There have been a number of pupils identified who can be brought back into Bury with 27 cases having placements ceasing or returning to Bury in the next academic year. Conversations regarding high school placements are starting earlier in Year 5 so by Year 6 the planning process is well underway.

It is important that there is sufficient capacity within the borough to give a choice so a lot of work is taking place to ensure there is additional capacity in Bury.

Julien Kramer emphasised that the LA want to provide a tighter more focused system and to invest in Bury provisions with a significant investment needed at the beginning. The LA is looking at all existing streams and undergoing a system change with a more transparent and fair process via Cath Atherden and a more rigorous and fair system with regards to Support Plus funding.

Forum queried how the free special school fits in to the mix and how this school would be funded and it was confirmed that there is already future planning for places with the free school when built and open. The free school would be funded on the same basis as other maintained special schools and the DfE are also contributing to the capital costs of the build.

Forum asked if the cost of a place would be less expensive than an out of borough placement. It was confirmed placement costs depend on the level of pupil need and generally cost a lot less than external placements, however if a high category of need and support is determined this could cost similar to an out of borough special school but there may be a significant saving in the transport costs.

The whole aim is to enrich Bury's provision as Bury can provide better quality, control and provision than sending a pupil out of borough and it also gives a pupil a more inclusive feel as they are retained within the community and not just sent off to school.

Forum queried if Bury schools were impacted financially when they have non-Bury pupils in their schools and it was confirmed that the LA has a strong recoupment process in place and all funding is recouped at Bury's schools costs and not what other LA's wish to pay. A pupil's home LA pays for transport costs.

The LA is planning to introduce a banding mechanism for SEN support to schools. The current system based on hours does not give schools the flexibility to use the funds in a more innovative way and schools can just allocate a 1:1 support via a teaching assistant which is not always the best support for a pupil, also parents are aware of the support detailed in EHCPs.

Consultations need to take place before the banding system can be introduced with a conversion programme, phasing it in from April 2021 during annual EHCP reviews.

There will be a further update at the January Schools' Forum meeting.

Jane highlighted a recent positive case of an at risk pupil who was identified early and with investment and inclusion support this pupil went on to get good GCSE results.

Forum thanked Jane Harrison for her update.

c) Charging for School Transfers, Excluded Pupils & AP referrals

Nick Bell (Secondary Inclusion Lead) presented a paper prepared by himself together with Cath Atherden (Service Manager – Inclusion) and summarised that there continues to be positive developments in Bury in respect of permanent exclusions due to various factors such as clear processes for all involved, continuing development of outreach services, the development of three KS3 assessment hubs and the development of a partnership between the Secondary PRU at Spring Lane and the secondary schools in the Inclusion Partnerships.

The continuum of support for SEMH has been reviewed and steps have been taken to address gaps in provision including the development of a Year 10 vocational pathway and mentoring officer. Year 11's currently have Milltown House which provides more vocational routes working with Bury College in the majority but also alternative providers.

The development of the 3 KS3 assessment hubs has been hindered by lockdown with two opening shortly before lockdown and the third opening this term. The hubs will provide a key secondary level step to assist in preventing exclusions.

There were 59 permanent exclusions in 2017/2018 which was significantly reduced by 63% down to 22 in 2018/2019. The 2019/2020 academic year figure was 23 due to a significant number from one school in January/February time. This figure would have been higher in a normal year however lockdown stopped this. The school is working with the partnerships to ensure steps are put in place to assist in this area.

Forum queried the DfE codes with DB having the higher number of permanent exclusions. Nick confirmed that DB was Disruptive Behaviour where a number of serious incidents over time resulted in the exclusion. PA and PP were related to physical assault and usually a one-off incident.

The Hubs are targeting disruptive behaviour where they should have a strong impact as they aim to identify needs and continuously assess the needs.

There has been an increased pressure on the Partnership budget this financial year. The spend on alternative provision during the summer term was higher than anticipated due to lockdown and a delay in re-integrating pupils back into school but the benefit of this provision is that the pupils continued to have an education. There are few pupils in alternative provision at the moment and there has only been one permanent exclusion this term at Secondary level.

Forum were advised of the agreed charging mechanism to schools where £6k per permanent exclusion will be transferred to enable the funds to follow the pupil to pay for the required provision and preventative work.

The aim that all the hard work involved within inclusion will have significant long-term positive effects on the out of borough budget.

Forum thanked Nick Bell for his update.

d) Pupil Premium Policy

Three PPG Policy papers had previously been distributed with the agenda and were for information.

7. Children & Young People Directorate

Julien Kramer explained that the LA had undertaken a substantial programme during the summer planning the opening of schools for the autumn term with risk assessments and rigorous cleaning undertaken to help delay the Coronavirus spread in schools when they returned. Unfortunately there were 17 cases in the first week and by week 3 there were school closures. At one point there has been approx 2,000 pupils and over 200 staff isolating at one time.

The numbers are reducing which maybe explained via the track, trace and test system being more helpful plus a more practiced and managed system of bubbles, cohorts and the way pupils move around schools.

The system is running calmly and collected during these unprecedented times and the LA is particularly concerned about well-being with schools having seen that some pupils have significantly regressed in their learning and behaviour with others. The well-being of staff and Headteachers is also very important.

Union representatives highlighted that Bury has a dedicated team but schools are facing additional pressures of Ofsted, DfE and financial issues which is adding to the fragility of the service and affecting education leaders and their teams. The current situation is not sustainable for much longer at the current rate. It was discussed that staff are "on their knees" with the added stress of blended learning and preparing the lessons for both in and out of school learning. Unions are meeting with the LA every Monday morning and well-being of staff is a key priority.

Schools discussed although schools follow strict procedures there is nothing they can do to stop children mixing out of school. Some pupils are meeting in parks, going to the cinema or having sleepovers with pupils in different bubbles. Pupils are sent home to self-isolate and later seen in the park together. It was acknowledged that this makes the situation more difficult but the schools are doing the best they can.

Action
JK

Forum proposed that the LA send out notifications to all families whether by a newspaper article, email, social media etc to reiterate the fact that children should not mix. Julien Kramer will discuss this with the COMS team.

The uncertainty for the children is causing a lot of stress especially for the Year 11 pupils who are asking what is the point studying at this time.

8. National Funding Developments

Steven Goodwin presented his update paper explaining that every pupil in England is to see another rise in funding in 2021 per the DfE announcement on 20th July 2020. The increase comes in the second year of a three year £14.5bn national funding settlement for schools with £2.6bn in 20/21, £4.8bn in 21/22 and £7.1bn in 22/23. This increases Bury's funding by £10.833m 8.5%, with £6m relating to the teacher pension and pay grants which will be built into the budget from 21/22.

Excluding the grants the overall uplift to Bury's schools and academies funding per pupil is 3.8% or £4.819m for 2021/22. Individual schools will see greater or lower % variations than 3.8% depending on their own per-pupil circumstances for key factors including Deprivation and Low Prior Attainment.

The percentage increase per-pupil for Bury represents the 30th highest out of 149 Local Authorities and is the 5th highest out of the 23 North West Local Authorities.

Steven detailed the Schools Block allocation formula factors which includes the basic entitlement increasing by 3% excluding the teacher pay & pension grants.

IDACI data has been updated and the DfE have tried to mitigate the shift of lower deprivation areas to stop big gains and losses. IDACI is based on pupil home postcodes and considers crime, poverty, unemployment etc and is mapped into banding areas. Bury has a wide ranging mix of deprivations with some areas in the top 400 of most deprived areas and some in the 400 least deprived areas which is a huge range and often means Bury loses out. The LA will continue lobbying the DfE for increased funding for deprivation.

There is no decision for the Schools Forum to be made in the majority as the borough has transferred to the National Funding Formula figures but is proposed that the Bury Primary Schools Lump Sum figure is reduced from £120k down to the £117,800 National Funding Formula (NFF) value.

Once the 'hard' NFF is in place then the roll of the Schools' Forum will evolve with a greater need for consideration in the High Needs and Early Years areas.

Minimum Funding Level (MFL)

As part of the levelling-up of schools per-pupil funding the Government have specified minimum levels of funding per pupil that all schools must receive through the formula allocation. If, for any reason, a schools' formula does not provide sufficient to meet the MFL then their budgets are topped up to guarantee they can achieve the minimum funding requirement. The MFL currently protects 13 schools/academies in 2020/21 – this position will be reviewed for 2021/22 in light of the increased funding and MFL announcements.

High Needs Block

The High Needs Block has been increased nationally by £730m and the indicative funding announcement for 2021/22 provides Bury with £36m which is an additional £3m or 9.7% increase from 2020/21.

Unfortunately this increase does not reflect any greater proportion of funding targeted to the High Needs Block from the overall DSG allocation and therefore does not recognise the increasing pressure on this area faced by LAs. The Government are still undertaking their 'Major review of High Needs' and the outcomes of this are expected to inform the future distribution of funding to the High Needs Block. In the meantime the Local Authority must live within its means plus recover the accumulated deficit in accordance to DfE requirements.

An estimated increase of £3m has already been incorporated into Bury DSG Deficit Recovery Plan, therefore this new announcement does not materially provide any additional funding, above that already expected.

The percentage increase for Bury represents the 137th least increase out of 149 Local Authorities and is the 23rd lowest out of the 23 North West Local Authorities

The Teachers Pay & Pension grant transfer for Special Schools and PRU's will be allocated through an additional £660 per place on the statutory £10,000 place funding level.

Central School Services Block

The indicative settlement indicates a slight increase to Bury's allocation from £0.774m in 2020/21 to £0.813m in 2021/22. Many LA's are seeing reductions to this block due to the Government commitment to remove 'historical' items from it. Bury has only ever had one small historical commitment approved many years ago by Schools' Forum in respect to contributing to the costs of the Safeguarding in Schools Officer. The phased reduction to this historical funding has been balanced in previous years due to the postholder moving to part-time hours and then with a vacancy. A review of the current costs will need to be assessed to consider how the post will be funded from 2021/22.

Early Years Block

No funding announcements for Early Years funding 2021/22 have been made as yet – this is expected post January 2021

Covid Funding

Any funding relating to Covid will be treated outside the main delegated budget. To date there has been information regarding a Covid Catch-Up Grant aimed at helping schools to get back on track and teaching a normal curriculum as quickly as possible plus the Corona Grant for PPE and additional costs incurred during the summer term which schools have applied for.

9. Schools & Academies Formula 2021/22 – For Recommendation

a) Formula Unit Values

Steven Goodwin presented the Schools & Academies Funding Formula 2021/22 which detailed the recommendation for distributing the Dedicated Schools Grant (DSG) Schools Block. The indicative analysis shows that primary schools will be in receipt of a £5.3m increase and high schools a £4.7m increase although these figures are subject to change in line with the validated October 2020 pupil census and other updates such as Business Rates.

Primary School Lump Sum

The phased reduction of the Lump Sum for Primary schools is in the final year of transition and the lump sum will reduce by £2,200 to mirror the NFF figure of £117,800 for all sectors. Forum should note that this is lower than an anticipated £115,000 Lump Sum as the unit value has now increased in the NFF. The reduction is more than offset for all Primary schools given the increases to all other factors and the MFL also protects schools.

Forum asked if there was any other alternative than this reduction to consider and it was explained that High Schools jumped straight from the £125k down to the £110k but Primaries decided a phased approach and this was the final year of this agreement. If Schools' Forum disagreed with the proposal the DfE may ask why.

R1. Primary Forum members agreed to the Primary School Lump Sum being reduced to £117,800 in accordance to the National Funding Formula (NFF) proposals.

Minimum Funding Guarantee (MFG)

The statutory guidance allows for Schools' Forum to consider applying an MFG to protect pupil level school funding at a rate between 0.5% and 2%. The rate was set for 2020/21 at 1.84% in line with recommended DfE inflationary protections. The DfE have recommended the MFG is set at 2% for 2021/22 which guarantees all schools get a minimum 2% increase per-pupil. This does not protect schools with a falling roll.

This is a vote for Primary and Secondary sectors, although MFG does apply to special schools they do not generally need this protection.

R2. Primary and Secondary Members agreed to the 2% Minimum Funding Guarantee.

b) De-Delegation – CLAS (Maintained Primary Sector only)

For Maintained Schools only, the formula mechanism contains options for schools to choose to de-delegate an amount from their formula allocation to contribute to LA services that work to support them. Academies are able to buy back into any services directly. The De-delegated options for consideration are:

- Schools of Concern / Contingencies at £6 per pupil – there is no suggestion of increasing these unit values. Covers Wendy Jackson's team.
- FSM Benefits Checking at £5 per pupil – helps schools manage checks and maximise deprivation & pupil premium funding.
- Trade Union Facilities Time at £4 per pupil – all but one academy buys back
- EAL (CALs) – see below

Since 2018 Secondary schools stopped contributing towards CLAS and it was previously suggested that Primary schools de-delegation would cease in 21/22 for this service as this is when the 'hard' National Funding Formula was due to start and would remove any de-delegated options anyway.

Forum discussed that it was a huge concern that cutting this funding for the CLAS provision would be a massive impact on the service CLAS provides and would worsen a valuable provision for families.

Five secondary school (maintained & academies) and three primary academies are buying the SLA plus other schools are buying different levels of support but this creates a volatility for service planning.

The service is significantly supported by high needs funding which assists in service continuity but it is hard to maintain a quality of service with ad-hoc commissions. It has also been recommended that a review of the contribution from High Needs funding, in line with the CLAS service review, takes place. If the core funding provided via the high need block also reduces or is fully removed it is even harder to manage and plan a service. EAL learners, asylum seekers, refugees and Gypsy, Roma and Traveller pupils can arrive in Bury at any time, in any school. Without a secure service, this need is very difficult to address.

Forum asked Melanie Griffin (CLAS Manager) what the likelihood was with regards to primaries buying back the CLAS service and it was agreed that this is unclear as the service has been struggling to maintain its day to day service through lockdown and partial school openings etc so it has been hard to prepare for a traded service and make predictions at this time.

This matter has been discussed at length at previous meetings and had already been agreed in principle to cease at this time. If the NFF had come into force it would have taken away this decision.

R3. Primary Members agreed to cease de-delegation of primary funding for CLAS from 1st April 2021.

c) Headroom

After all formula factors have been updated as per the agreed recommendations and in accordance to the NFF unit values, there is a balance of DSG Schools Block that remains un-allocated. This balance is required to cover any outstanding updates to budget determinations such as October 2020 census variations, growth, falling rolls, business rates and MFL & MFG protections.

Once all the values have been updated and any amounts to support growth and falling rolls have been agreed and there remains a balance of unallocated Schools Block funding, the LA respectfully requests Schools' Forum consideration to transfer this balance by way of supporting the deficit recovery on the High Needs Block.

Schools' Forum may recommend up to 0.5% transfer of Schools' Block without any disapplication process being required to be approved by the Secretary of State for Education. For information, 0.5% of Burys' 2021/22 Schools Block is £700,434. Currently there is around £560,000 unallocated on the indicative 2021/22 budget determinations but this will be significantly lower once all updated figures from the headings above are included.

The schools asked if this could be used to help reduce the de-delegation amounts per pupil and it was confirmed that this link would not be allowed.

The schools discussed that this could be used to help support CLAS. Steven Goodwin will investigate if this option is allowable through the high needs block.

This item was deferred to the November meeting.

10. **DSG Deficit**

Steven Goodwin referred to papers previously distributed with the agenda.

a) DSG Recovery

Agenda Paper 10a was a Report to Cabinet to ensure members were aware of the significant accumulated deficit of the Dedicated Schools Grant (DSG) over the last 8 years and to seek members support as difficult decisions are needed to recover this debt. The deficit is currently £20.067m. The Cabinet approved the document and acknowledged their support.

b) DSG management Template

Agenda Paper 10b detailed the DSG Management Plan headings for information.

c) DSG Recovery – Schools’ Forum Recommendations

1 CLAS Agenda Paper 10c was written to summarise the fundamental and critical considerations that Schools’ Forum can make in their recommendations to support the DSG recovery. Table 3.9 details the lines itemised in the Section 251 relating to the High Needs Block. The area highlighted green on Page 1 summarised the services which the LA has agreed to bring back under the General Fund’s umbrella of funding and will sit outside the DSG funding stream. This totals £2,294,700 of funding to be paid via the LA in future years which is an important factor for Schools’ Forum to consider.

Agenda Paper 10d was a draft Report to Cabinet regarding the CLAS service to consider removing the significant contribution from the High Needs Block of nearly £694,000 with a service restructure and changes to its service to reduce its costs, deliver a traded offer and income generate. The LA asks Schools’ Forum to consider this contribution in-line with the plan to remodel the service over the time required to enable income generation to support the reduction and not just remove the £694k overnight.

Forum agreed to a review of the CLAS service in principle but asked if further information could be brought back to the next meeting with figures to assist in making the decision required.

2 It was agreed by Forum in 2014 that **Schools Crossing Patrol** was to become a traded service. With effect from April 2015 schools received a delegated budget for this, plus Health & Safety buy-back and allocated an additional Lump Sum of £5,000 plus £30 per-pupil for Primary and £20 per-pupil for Secondary. The cost of a School Crossing Patrol staff member at that time was around £3,500.

After school budgets were finalised and published there was very little uptake from schools to protect the service so the then Head of Finance decided to fund this via the High Needs Block with a tenuous link to inclusion which is not helping the deficit and not permissible when the final National Funding Formula takes over and is not a sensible way to use the High Needs budget which is so significantly in debt.

The LA will retain the responsibility to fund any statutory duties regarding recruiting, employing and training plus any highway responsibilities however it must now be decided how this service is going to be funded. It will be approximately £4k per patrol officer and it is suggested that costs are charged to the relevant schools and where required the costs can be shared between schools.

An ongoing review would take place as more automated crossing are put in place but this was a discussion for highways. Other options would be traffic calming measures.

Forum discussed safety was imperative although some schools would be hit harder than others especially if more than one patrol officer serviced a school.

Schools' Forum asked if an analysis of current School Crossing Patrol officers and their costs to each school could be provided as the next meeting. It was agreed this matter would be discussed further in November with the data to help support a decision. A decision will be needed in the November meeting.

A suggestion was made that local businesses could be approached to sponsor crossing patrols in the future.

11. Covid-19 Funding Update

An update paper has been provided and is for information purposes only.

Steven Goodwin confirmed that the funding from the summer term claim was beginning to come through with schools receiving emails from the DfE. Where schools had claimed over the allowable limits or used the other costs category the DfE have held back this funding for further analysis with an answer due within six weeks.

12. Date of Next Meeting

The dates of the next meetings were confirmed as follows:

Tuesday 24 November 2020 - 4 pm – Microsoft Teams
Further meetings to be scheduled in due course

13. Any Other Business

There was no further business to discuss.