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## BURY SCHOOLS' FORUM

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### MINUTES

of the meeting of Bury Schools' Forum on  
**Tuesday 12<sup>th</sup> October 2021**  
Microsoft Teams Meeting

#### In Attendance:

##### Early Years

Rachel O'Neil                      Headteacher – Hoyle Nursery

##### Maintained Primary

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

##### Maintained Secondary

Tina Owen                      Headteacher – Philips High  
Susan Southworth                      Governor – Derby High

##### Academy

Sue Armstrong                      Shaw Education Trust (SET) Unsworth Academy  
Heather Standbridge                      School Business Manager – St Teresa of Calcutta RC MAT  
Martin Van Hecke                      Roch Valley Trust – St Thomas Primary

##### Special

Joanne Hurst                      Millwood Primary

##### Special Academy

Orienne Langley-Sadler                      Oak Learning partnership

##### Pupil Referral Unit

None in Attendance

##### Non-Schools Sector

Rosie McKelvey                      Deputy Principle Holy Cross  
Tony Durack                      NASUWT  
Helen Chadwick                      NAHT  
Helena Thom                      NEU

##### Children's Services Department:

Isobel Boler                      Director of Education & Skills  
Paul Cooke                      Head of Schools & Academies  
Steven Goodwin                      Head of Strategic Business & Finance  
Alison Vidler                      Principal Finance Officer (Schools & Systems Finance)  
Carole Benson                      Senior Finance Manager  
Elissa Reeve                      Senior Finance & Business Manager (Clerk)

**Observers:**

James Franklin-Smith	Oak Learning partnership
Kristie Bloomfield	Oak Learning partnership
Katherine Ashworth	Millwood Special School
David Monger	AMEO – FutureGov

**1. Apologies for absence**

Gail Branch	Headteacher – All Saints CE Primary
Lawrence Yarwood	Governor – Bury CE High
Joanne Hurst	Headteacher – Millwood
Carina Vitti	14 – 19 Representative
Brian Roadnight	Headteacher (Chair) – Shaw Education Trust (SET) Woodhey High
Emma Ford	Headteacher – Radcliffe Hall – Christ Church MAT
David Waites	Executive Headteacher - Vision MAT
Richard Ainsworth	Governor (Plus Governors Forum)

In the absence of The Chair (Brian Roadnight) and no official Deputy Chair, Forum were asked if a member of the school community would like to Chair the meeting as this would be considered more impartial than a LA representative. As there were no volunteers it was agreed that Paul Cooke Head of Schools & Academies at the LA would Chair the meeting on this occasion.

**2. Introductions**

The Chair welcomed all Forum members to the meeting via Microsoft Teams and introduced James Franklin-Smith CEO of the Oak Learning Partnership, David Monger SEND Consultant on Programme Safety Valve from AMEO and Carole Benson, Senior Finance Manager (LA) working on the Programme Safety Valve.

It was also identified that there were additional observers at this meeting and Katherine Ashworth from Millwood Special School was welcomed.

**3. Appointment to Chair of Schools' Forum**

As an annual decision Forum were asked if anyone wished to be nominated for the role of Chair of Schools' Forum. It was confirmed that Brian Roadnight had expressed an interest to continue in this role and as there were no other expressions of interest or nominations, it was agreed for Mr Roadnight to continue as Chair.

Forum were asked for expressions of interest for the role of Vice Chair in the event of the Chair being absent at any subsequent meetings and Emma Moncado volunteered. Forum thanked Emma Moncado and agreed for her to be Vice Chair.

Steven Goodwin confirmed that although there had been one more academy conversion, a review of the mix of Forum representatives was not required at this time. Forum is continually reviewing the mix to ensure a fair representation of each sector based on the breakdown of pupil numbers split between primary and high and maintained and academies.

#### **4. Minutes of the last Meeting**

The minutes of the meeting held on Wednesday 30<sup>th</sup> June were checked and agreed as a correct record of the meeting.

#### **5. Matters Arising from the Minutes (30/06/21)**

##### Page 2 School Crossing Patrol

Forum asked for an update, and it was confirmed that no issues had been raised by the School Crossing Patrol team since the last Forum meeting however charges had not been processed.

Action:  
Steven  
Goodwin

Steven Goodwin will liaise with School Crossing Patrol and report back at the next Forum meeting.

##### Page 7 Schools' Forum Communication & Engagement

Forum asked for an update on the progress of how Forum discussions would be communicated to schools. It was confirmed that there was a renewed effort into improving communications to ensure information is cascaded down to all stakeholders for transparency and that everyone involved was on the same page. AMEO Consultants are developing a Communication Strategy to inform all stakeholders of discussions and decisions.

Steven Goodwin reiterated that he would be happy to attend BAPH and BASH meetings to help explain more complex issues.

#### **6. Children & Young People Directorate (Isobel Booler)**

Isobel Booler confirmed that Sheila Durr, Executive Director of Children and Young People, had decided to leave the service of the Council therefore Isobel was now Acting Executive Director of Children and Young People with the support of Paul Cooke as Head of Schools & Academies. This is an interim role and expected to be short term when Isobel can return to her education and SEND roles as soon as possible.

Updates from the Children & Young People Directorate were shared at the recent Headteachers' Conference which was well-attended.

Isobel confirmed that the focus was on statutory roles and improving services and ensuring the improved communication continues.

The Schools' Toolkit has been finalised and the LA is offering quality assurance support to all Bury schools.

Education services are taking a pupil place planning paper to Children and Young people scrutiny which does have financial implications and may come back to Forum..

The additional Funds from Project safety Valve in the High Needs Block funding is an intervention and every area of spending needs to be scrutinised.

The LA's aim is to work closely with schools and most especially special schools as a priority with details of the paper to be discussed initially at Schools' Forum sub-groups. Isobel apologised for the recent distribution of an Outline Financial Plan paper which was not initially intended for wider circulation and was early working.

Special school representatives confirmed that they would have liked to have been consulted about the paper before any distribution took place and highlighted the level of expertise accessible within the Schools' Forum. It was acknowledged that usually the quality of consultation by the LA is very high and one member of forum stated that for this paper to have been shared without consultation was disgraceful.

The LA apologised and explained that there was a genuine commitment to work in partnership with schools and for an early meeting to get relationships back on the correct footing. A meeting with the special schools has been arranged for next week.

Forum thanked the LA for the apology and for recognising some inaccuracies in the paper.

Steven Goodwin apologised and acknowledged that he was at fault for distributing the document which had no conclusions but was an analysis of data and proposed suggestions. Steven confirmed all aspects of SEND were being looked at and this paper addressed one element of the Programme Safety Valve only that is intended to be discussed in detail through the Schools Forum Sub-Groups referred to later in the agenda.

## **7. National Funding & Bury's formula 2022 / 2023**

Steven Goodwin presented his update paper explaining that 2022/2023 was the third and final year of a £14.5bn national funding settlement for schools.

The DSG funding was announced by the DfE in July 2021 and the figures are indicative as they are based on the October 2020 pupil numbers and will be updated once the October 2021 Census data is validated and released by the DfE towards the end of December. Therefore, changes to the figures will be due to fluctuations in pupil numbers.

In summary:-

- The Schools Block will see an increase of approximately 3% which is in line with Government National Funding Formula notifications
- The High Needs Block will see an increase of 8% which is in line with other LA's and was already anticipated and factored into the DSG deficit recovery plans and cost commitments going forward.
- The Central Schools Services Block (CSSB) will see an increase of 5%. This block funds a few essential services and one small historical commitment approved many years ago by Schools' Forum in respect of contributing to the costs of the Safeguarding in Schools Officer. As the historic commitment element of the CSSB is reducing how to fund this post needs to be considered moving forwards.
- The total Schools, High Needs and CSSB Blocks increase equates to 4%.
- There are no indicative figures for the Early Years Block at this stage.

## 1) Formula Unit Values

Steven Goodwin presented the figures for 2022/2023 formula values explaining that Forum were required annually to recommend the formula unit values to be applied to all Mainstream Schools & Academies funding allocations. Since 2018/19 Bury has transitioned to the National Funding Formula unit values as recommended by the DfE. For 2022/23 the unit values specified mirror the latest National Funding Formula (NFF) unit values.

**Recommendation 1: Forum recommended all the unit values specified to be applied in compliance with the National Funding Formula (NFF) to Bury's Mainstream schools and academies funding formula for 2022/23**

## 2) De-Delegation

Forum (Maintained Mainstream only) are required to recommend the De-delegated items each year. Academies can buy back into any services directly. De-delegation has significantly reduced over recent years and there are now only three areas for consideration:-

- Schools of Concern / Contingencies at £6 per pupil
- FSM Benefits Checking at £5 per pupil
- Trade Union Facilities Time at £4 per pupil

There are no proposed increases to any de-delegated items. The report transposed in error the per pupil rates highlighted in grey between FSM and Trade Union Facilities time for 20/21.

Forum queried if the de-delegated FSM per pupil amount was applied for all pupils or FSM only and it was confirmed that the per pupil was for all FSM and Ever-6 pupils only.

Forum queried what the FSM Benefits Checking contributed towards and it was confirmed that the funding contributed to the costs of the Benefits Team at Whittaker Street to support their work in significant volumes of assessments of eligibility of benefits that informs schools for FSM and Pupil Premium census updates, although it could not be confirmed if this included an additional member of staff.

Forum queried if the Benefits office were doing additional work within their roles due to schools and it was confirmed that there was no additional work, but the schools had always contributed as schools can generate an increased workload to the Benefits Team. Schools contribute approximately £16,000 out of £143 million of funding they receive.

The funding amount is decreasing due to academisations although the work remains. Forum asked Steven Goodwin to investigate what would happen if all schools academised and no contribution to the Benefits Team was made. Steven Goodwin agreed to liaise with the Benefits Team to find out and if the funding related to a member of staff.

Action:  
Steven  
Goodwin

Steven Goodwin informed Forum that at the next meeting he would have a paper from Unison asking if the Trade Union Facilities Time de-delegation could be extended to include Unison.

**Recommendation 2: Forum agreed to defer the decision on all de-delegated items until the next Forum meeting in November.**

3) 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 2.00%. The rate recommended by the DfE for 2022/23 is 2.00% in line with inflationary protections and consistent to the maximum MFG applied to the 2021/22 formula.

The LA proposes that Forum agree to the 2% as per the DfE recommendations.

**Recommendation 3: Forum agreed that the MFG protection is set at 2.00% in line with DfE Guidance.**

4) Headroom

After all formula factors have been updated as per the Forum recommendations and in accordance to the National Funding Formula 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 as follows:

- **October 2021 Census Variations** – pupil numbers will be adjusted for in the final Schools Block determination with variances being funded via the available headroom monies. There is an anticipation of increased free school meal eligibility with initial estimates around £500k.
- **Growth** - where increased pupil intakes require additional classes to meet infant class size regulations.
- **Falling Rolls Fund** - funding may be set aside from the Schools Block to create a small fund to support good schools with falling rolls.
- **Business Rates** - Business Rates has now been centralised nationally and will be subject to a Dedicated Schools Block top slicing arrangement between the LA and the DfE directly from 1st April 2022. However, where there have been any Business Rates adjustments during 2021/22, then any corresponding adjustments will be included in schools budget determinations for 2022/23 only. These adjustments are not notified until January each year and may require use of Headroom funding if necessary.
- **Minimum Funding Level & Minimum Funding Guarantee Protections** - once all final data has been input there may be increased protections required on individual schools' budgets to ensure their actual budget allocations comply with the MFL and MFG funding per-pupil levels and protections.

If when all items above have been updated to reflect the actual individual schools budget determinations, and any amounts to support growth and falling rolls have been allocated, there remains a balance of unallocated Schools Block funding, the

LA will factor a transfer of this balance by way of supporting the deficit recovery to the High Needs Block.

Steven Goodwin asked Forum to allow the LA time to update all the formula characteristics and then bring back to Forum's January 2022 meeting for further discussion and final decisions regarding the outstanding Headroom items plus a transfer of any balance of unallocated Headroom to the High needs Block.

**RECOMMENDATION 4: Forum agreed in principle to the use of Headroom to address all outstanding items outlined above and to a transfer of any balance of unallocated Schools Block Headroom to the High Needs Block, the amount to be agreed and confirmed at the meeting of Schools' Forum in January 2022.**

APT Pro-Forma Extract – Indicative 2022/23 Steven Goodwin briefly explained the table which summarises the total funding for maintained and academies for Bury based on October 2020 census figures. The Total Funding for Schools Block Formula is £142,528,803.

When the APT is finalised in January it is sent to the DfE along with individual schools funding.

Early Years Funding - subject to the outcome of the Comprehensive Spending Review (CSR) and funding settlement for 2022/23, the DfE have submitted a business case to Treasury which will effectively remove the annual consideration by ensuring the appropriate level of funding to cover the Maintained Nursery School protected level of funding, plus inflationary increases that have not been applied to early Years funding for several years, is allocated to the Early Years Block of the DSG from 2022/23 onwards. This will especially provide stability of funding for Hoyle Nursery School.

The DfE have noted that declining birth rates will have an impact on overall funding allocated to the Early Years Block nationally.

The DfE are also continuing to undertake analysis of the impact of funding on all Early Years provision which, at present, is indicating that current levels of funding do not appear to be adversely affecting settings. They are aware that parental income may be subsidising provision in some cases, and they are also mindful that the full impact of Covid is not fully realised yet.

Other areas highlighted in the report were:-

High Needs Funding - The long-awaited major review into High Needs Funding is still subject to consideration by the DfE and is further delayed due to recent changes in Ministerial appointments.

Covid Cost Reimbursement - The DfE have stated that they have no plans to provide any further funding for schools Covid costs reimbursements. They are however continuing to provide various Covid Grants including Covid Recovery Grant and Testing funding.

National Insurance Rates - The DfE have confirmed that Treasury have set aside funding to assist with the impact of the NI increases faced by schools. It is highly likely the funding to support NI pressures will be provided as a separate grant prior to funding being allocated to the DSG directly.

Capital - The DfE have submitted a substantial bid to Treasury for increased Capital funding with a focus on refurbishment, repairs, and maintenance plus developments of SEND provision for schools & academies. Bury has already received £3.8 million in Capital funding as part of the Programme Safety Valve.

Comprehensive Spending Review – this will not impact the 2022/2023 Schools Block funding but will be part of the multiple year revenue and capital funding from 2023/2024 onwards.

## **8. DSG Deficit Recovery – Project Safety Valve (PSV)**

Various papers relating to Project Safety Valve were shared with the Agenda which included an update dated October 2021 which has also been shared with the DfE. It was confirmed that the DfE's intervention is significant, and all areas are being monitored, tracked, and scrutinized with the plan to recover the deficit by 2025 otherwise Bury LA will be in breach of the agreement.

The DfE are working with 5 other LA's on a similar basis as a pilot with a view of transforming High Needs. The LA is working closely with AMEO Consultants.

### Proposals for Banding Scheme

A graduated approach is being adopted for children and young people with SEND and a new model is proposed which uses a stepped ladder of intervention as its basis. To achieve consistency and equity and to reduce the workload for all staff involved in the process, it is proposed that Bury moves to a banding scheme, as most Local Authorities have done. The model will be used to assign EHCPs into categories of need for funding purposes. Each range will have an applicable level of funding and a school or provider is allocated a set value of top up funding according to the range of the EHCP as determined by the SEND Panel.

Forum expressed concern that there were different banding levels for special schools and mainstream schools and suggested that funding should be based on the needs of the child and follow the child and not be setting based. If a parent then chooses a setting then the funding should go with the child to that setting to ensure adequate financial support. It was also highlighted that it is important to ask a child where they would like to go to school.

It was confirmed that the bandings were subject to further discussions with a view that funding is appropriate at each band and has clear and accurate descriptors. Consistency and transparency are also important with the banding system.

In the summer term 2021 there were 814 children and young people in mainstream schools for whom top-ups were allocated with over 100 inconsistent different hourly scenarios for children with similar needs.

### Schools Forum PSV Sub-Group

Action: All  
Forum  
Members

Forum members were asked to volunteer to become members of the PSV Sub-Group as representatives from schools to discuss the EHCP bandings. Forum members are to send their expressions of interest to Steven Goodwin as soon as possible.

Steven Goodwin thanked Susan Southworth, Tina Owen, Clare Simon , and Simon Waddington to be part of the group to review Mainstream EHCP top-up proposals with the first meeting to convened as soon as possible.

A separate meeting with Special schools to discuss all aspects of SEND transformation, including place planning and bandings, is to be set up prior to half-term.

It was agreed that no further documentation was to go out without prior consultation.

### **9. Date of Next Meeting**

The dates of the next meetings were confirmed as follows:

Tuesday 16 November 2021 – 4pm

Tuesday 18 January 2022 – 4pm

Tuesday 14 June 2022 – 4pm

Tuesday 18 October 2022 – 4pm

Tuesday 15 November 2022 – 4pm

Tuesday 17 January 2023 – 4pm

Action:  
Steven  
Goodwin

Steven Goodwin will send out Teams invites to new Forum members in due course.

### **10. Any Other Business**

There was nothing further to discuss.