
BURY SCHOOLS' FORUM

MINUTES

of the meeting of Bury Schools' Forum on
Tuesday 14th June 2022
Microsoft Teams Meeting

In Attendance:

Early Years

Rachel O'Neil Headteacher – Hoyle Nursery

Maintained Primary

Paul Lord Headteacher – Heaton Park Primary
Emma Moncado Headteacher – St Joseph's RC Primary (Vice Chair)

Maintained Secondary

Susan Southworth Governor – Derby High

Academy

Brian Roadnight Headteacher (**Chair**) – Shaw Education Trust (SET) Woodhey High
Heather Standbridge School Business Manager – St Teresa of Calcutta RC MAT
Martin Van Hecke Roch Valley Trust – St Thomas Primary

Special

Katherine Ashworth School Business Manager - Millwood Primary

Special Academy

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

Pupil Referral Unit

None in Attendance

Non-Schools Sector

Helena Thom NEU
Carina Vitti 14 – 19 Representative

Children's Services Department:

Isobel Booler Director of Education & Skills
Paul Turney Deputy Chief Finance Officer
Steven Goodwin Head of Strategic Business & Finance
Alison Vidler Principal Finance Officer (Schools & Systems Finance)
Elissa Reeveall Senior Finance & Business Manager (Clerk)

Observers:

1. Apologies for absence

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| Claire Simon | Headteacher – Bury & Whitefield Jewish Primary |
| Simon Waddington | Headteacher – Hollins Grundy Primary |
| Richard Ainsworth | Governor (Plus Governors Forum) |
| Joanne Hurst | Headteacher - Millwood |
| Lisa Corrigan | St Teresa of Calcutta RC MAT |
| Tina Owen | Headteacher – Philips High |
| David Waites | Executive Headteacher - Vision MAT |
| Carole Benson | Senior Finance Manager |
| Jemma Allman | DfE |
| Dan Tovey | DfE |

2. Introductions

The Chair welcomed Forum members and Paul Turney, Bury Council's Deputy Chief Finance Officer was introduced as attending as an observer. Paul Lord is a new Forum member representing the maintained primary sector.

3. Minutes of the last Meeting

The minutes of the meeting held on 18th January 2022 were checked and agreed as a correct record of the meeting.

4. Matters Arising from the Minutes (18/01/2022)

Forum queried if there were any changes to free school meal income and expenditure with the increased cost of living and it was confirmed that the costs of school meals were increasing slightly in September 2022 but there had been no information regarding any increase in free school meals income.

Page 7. Pupil Premium Grant – Forum queried if the allocations had increased on average by 3% and it was confirmed that all PPG components had increased by 3% as part of the 2022/23 funding allocations.

5. Bury Schools' Forum Representation – January 2022 census

Steven Goodwin presented the paper detailing the number of pupils per school and sector representation. It was confirmed that the current Mainstream sector representation is proportionate

Pupil numbers from the January 2022 census confirm Bury has 46% of its pupils in Academies and 54% in Maintained Schools. Forum representation also reflects the proportion of Secondary and Primary age children within each category which confirms Academies with 57% Secondary and 43% Primary, and Maintained Schools with 27% Secondary and 73% Primary.

The current representation of Forum is as closely proportionate in percentage terms as it possibly can be and is summarised:

Academies have 7 representatives; 4 Secondary and 3 Primary
Maintained Schools have 7 representatives; 2 Secondary and 5 Primary

Future representation will continue to be updated to reflect pupil number proportions

6. **Final Outturn 2021/22**

6a) Children & Young People Department

Steven Goodwin presented the Summary Financial Position 2021/2022 explaining that the four divisions of Childrens & Young People finished as follows:

- Childrens Commissioning overspent by £0.003m due to a vacancy being covered via agency staff
- Early Help & School Readiness underspent by £0.307m due to efficiencies, vacancies and maximisation of external funding where possible.
- Education & Skills overspent by approx £892k due to areas such as home to school transport, home to college transport, SEND Team interim agency support, CLAS being charged to the General Fund rather than the DSG, and departmental wide unachieved saving targets and bad debt provisions.
- Social Care & Safeguarding overspent by £2.041m due to areas such as the Safeguarding Team interim agency package, Initial Response Team interim agency package, Reliance on Agency cover in MASH, CSE, CASS, plus external legal fees, residential placements, independent foster agency fees and increase care leaver volumes.

The final CYP department deficit of £2.629m would have been much higher without mitigating costs pressures and overspends wherever possible with savings and maximising funding opportunities including,

- Children's residential placements
- Containing Outbreak Management Funding (COMF)
- Vacancy and Efficiency savings in other service areas
- Increased income contributions from Health and Adult Services

It was confirmed that although the report showed a budget of £17.339m in Education & Skills, departmental central recharges and accountancy entries formed part of this budget line and actually only £9.001m relates to Education & Skills services.

The LA is identifying recurring pressures and the Chief and Deputy Chief Finance Officers are aiming to address these issues. Some of the additional funding such as the COMF funding are not available in 2022/2023 therefore other ways to mitigate the spend need to be identified.

Forum queried that if there was a £2.629m deficit where did the money come from to pay for this and it was confirmed that the deficit is added to the bottom line of the LA overall financial position together with the other departmental financial positions and then after all income is received from areas such as Council Tax, parking income and investments in areas such as Manchester Airport the Council uses its reserves. Bury Council's reserves are diminishing and will not be able to sustain the council indefinitely.

Forum queried why there was an increase in care leaver volumes, and it was confirmed that these costs related to age 16 children moving into supported living and often these costs are more significant than the previous residential placements. In 2021 there was a significant increase in the number of teenagers becoming looked after which has subsequently had an impact in the increase to care leavers costs.

6b) Dedicated Schools Grant (DSG)

Steven Goodwin confirmed that the DSG deficit brought forward from 2020/2021 was £21.407m. This deficit increased during 2021/2022 by £66k. Although this was an increase it was significantly less than forecasted and the move of CLAS from the DSG to the Central Fund has helped.

The Central DSG carried forward £21.473m to 2022/2023 and the deficit recovery is subject to the formal Safety Valve agreement with the DfE.

Forum were advised that the Early Years Block was affected by an in-year reduction of funding and is subject to a review in line with actual participation for early years education and headcount data.

6c) Schools

For Maintained Schools only the final outturn for 2021/22 indicates:

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| Surplus Balance brought forward from 2020/21: | £7,883,461 |
| Surplus Balance carried forward to 2022/23: | £8,358,086 |
| Schools Surplus Balance variation: | £474,625 = 6% increase |

It was highlighted that the figures removed any schools which converted to an academy during the last financial year.

Forum queried about surplus/deficit balances when schools academise and it was confirmed that when schools convert, they do take the surplus balance with them. If a school undergoes a forced conversion due to an Ofsted inspection and has a deficit balance then this deficit remains with the LA, however if a school chooses to academise then the deficit follows the school.

In order to protect the LA, the LA can mitigate the prospect of a conversion leaving a deficit balance by removing the delegated powers from school with the aim of reducing the deficit before the date of conversion and to avoid schools overspending and then increasing their deficit to leave with the LA.

Steven Goodwin presented a breakdown of school balances as at 2021/2022 and also 2020/2021. The paper highlighted surplus balances and recent academy converters. There were three schools which carried over a deficit balance. Lowercroft has prepared a formal deficit recovery agreement. Sedgley Park has balanced the budget in 2022/2023 and Bury & Whitefield Jewish has a significant deficit which is in discussion with senior LA staff and a multiple-year formal agreement to recover the debt along with a school reorganisation is in progress.

Forum queried if action was required against the schools who have gone over the permitted surplus thresholds especially if these thresholds had been exceeded for 2 years or more. It was confirmed that school budgets were currently being uploaded to the finance system and each school will need to be looked at individually as some schools have already committed to investing the funds and therefore reducing the carry forwards to appropriate levels by the end of this financial year. The LA is aware that schools have received a supplementary grant this financial year to offset the increasing pressures of National Insurance, staffing costs and gas and electricity price increases, however these costs are escalating and need to be considered.

Surplus schools will be monitored closely as it is important that the current year's funding is spent on the current year's pupils.

It was reiterated that the LA has no plans to automatically take any surpluses above permitted thresholds and the LA has made no recommendations at this stage.

Forum highlighted that some schools have delayed building works due to the Covid pandemic and these were now planned but also costs have gone up. However it was suggested that schools with more than two years of exceeding the thresholds should be addressed.

The national level of school surpluses is also an issue for the DfE when going to treasury for more funding.

Forum queried if the continuous increasing of gas and electricity prices could send some schools into deficit, and it was confirmed that this could be the case as it had been quoted that schools could see a 400% increase in these costs.

Some schools are also struggling to balance in 2022/2023 as the supplementary Grant was not covering the full impact of increasing costs.

7. DSG Deficit Recovery – Programme Safety Valve (PSV)

A formal update paper for the DfE has been prepared and is with the Chief Executive and Chief Finance Officer for approval before submitting to the DfE by Friday 17th June.

Steven Goodwin summarised the key developments which are aimed at transforming practices and systems not just recovering the deficit which have been made:

- Staffing in EHC team
- Liquid Logic developments
- Data pack and dashboards
- Development of additional provision planned
- Graduated Approach due to be launched next term
- Staff induction impacting on numbers issued in June
- EHCP mainstream banding issues
- Unprecedented demand particularly for primary special

The LA acknowledge there had been a few issues with the transition from funding via hours to SEN Bandings and this is being actively worked on to make sure funding is mapped correctly and schools are being contacted with an aim of resolving the issues by the end of June where possible.

The final expenditure excluding programme management has reduced by £1.394m compared to 2020/21. The final outturn deficit including Safety Valve funding is - £21.469m –only £66k higher than 2020/21. The aim is to achieve a positive in-year position on the High Needs Block sustainable from 2022/23 onwards with a full recovery scheduled for 2025/26 with the current forecast deficit at 2024/25 at £1.37m.

As savings are made there are children then unfortunately still going to out of borough provisions, although the numbers have decreased. Out of borough schools are now passing on the impact of increasing costs to the LA's by increasing their placement costs.

The LA has seen a 105% increase in EHCP referrals for under 5s this year which is proving challenging. In total there were 63 referrals in March, 42 in April (with two weeks being Easter holidays) and 73 in May, mainly in young primary age children. It is felt that the impact of Covid is now being felt with children not having the language or communication skills.

Forum stated that some children are coming through with very profound needs which maintained schools do not have the specialisms to support. It was also acknowledged that the primary special school is having issues with the roof which is preventing any extension plans.

There is a £3.8m Capital Program aimed at developing as many provisions and places in the borough as possible.

The LA thanked schools for their continued engagement and shared ownership of the EHCP process.

The LA does have committed staff but there are still gaps in the establishment and there has been a high turnover of staff. Michael Kemp has been recruited as the Strategic Lead for Inclusion and SEND. Michael is a supporter in the multi-disciplinary approach and providing better provisions in the borough.

Forum queried that if schools have a lot of EHCP's would they be entitled to volume top ups. It was confirmed that although very few LA's do apply a volume top up formula, Bury does consider volume top ups when looking at the numbers of EHCPs per school.

8. Direct National Funding Formula (NFF) Consultation

- a) Implementing the Direct National Funding Formula – Government Consultation
Steven Goodwin explained that it expected that there will be three funding consultations over the next year the Technical Funding Formula, Central Services Block funding and the SEN and High Needs funding

The Technical funding formula is the first consultation about making the move fully to the National Funding Formula and remove the LA's input. Bury's primary and secondary schools are all funded using the national funding formula.

Steven Goodwin will work through the questions in the current consultation and consider the implications and will send more information onto schools in due course. The consultation has a deadline of 9th September 2022.

There are areas to consider such as the interaction between the Direct National Funding Formula (NFF) and the transfer of funding from the Schools Block to the High Needs Block. The DfE would like to automate this process but needs to consider how this is determined, for example by pupil numbers and is it just applicable to the basic entitlement part of the NFF.

Notional SEN also needs to be considered as currently each LA has a different way in calculating this funding in school budgets. The notional SEN element is to fund the first £6k of the SEN support per child.

Other areas the DfE will be looking into is the Growth/Falling Rolls formula, the Premises element if schools have split sites, and the Minimum funding Guarantee.

The DfE have recognised the difficulties with the financial year and academic year not being in line but has ultimately decided that this will continue.

b) Schools Bill Stakeholder Briefing – Paper was provided for information only.

9. Date of Next Meeting

The dates of the next meetings were confirmed as follows:

Tuesday 18 October 2022 – 4pm

Tuesday 15 November 2022 – 4pm

Tuesday 17 January 2023 – 4pm

10. Any Other Business

Schools Forum have two members attending their final meetings before stepping down.

Steven Goodwin and Forum thanked Claire Simon for over 5 years support and thanked her for her input. Unfortunately Claire had sent her apologies for her final meeting.

Steven Goodwin and Forum thanked Brian Roadnight for over 6 years of being a member of Schools Forum and in recent years in the position of Chair. Brian was acknowledged as a fantastic Chair who provided challenge to the LA and support to Forum. Mr Roadnight thanked Forum and explained that he was taking a role teaching maths in a school in Bolton in the next academic year. Mr Roadnight said that he had enjoyed his time as Chair of Schools Forum and that it had been a pleasure working with the members

Forum was thanked for their hard work for another academic year.