
BURY SCHOOLS' FORUM

MINUTES

of the meeting of Bury Schools' Forum on
Tuesday 18th January 2022
Microsoft Teams Meeting

In Attendance:

Early Years

Rachel O'Neil Headteacher – Hoyle Nursery

Maintained Primary

Gail Branch Headteacher – All Saints CE Primary
Emma Moncado Headteacher – St Joseph's RC Primary (Vice Chair)
Claire Simon Headteacher – Bury & Whitefield Jewish Primary
Simon Waddington Headteacher – Hollins Grundy Primary
Richard Ainsworth Governor (Plus Governors Forum)

Maintained Secondary

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

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

Kristie Bloomfield Oak Learning partnership

Pupil Referral Unit

None in Attendance

Non-Schools Sector

Tony Durack NASUWT
Helena Thom NEU
Carina Vitti 14 – 19 Representative

Children's Services Department:

Isobel Booler 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)
Elissa Reevell Senior Finance & Business Manager (Clerk)

Observers:

Katherine Ashworth Millwood Special School

1. Apologies for absence

Lisa Corrigan	St Teresa of Calcutta RC MAT
Rachel Pars	Headteacher – Bury College Education Trust (BCET) Elton Primary
Orienne Langley-Sadler	Headteacher – Oak Learning Partnership
James Franklin-Smith	Chief Executive Officer (CEO) – Oak Learning Partnership
Brian Roadnight	Headteacher (Chair) – Shaw Education Trust (SET) Woodhey High
David Waites	Executive Headteacher - Vision MAT
Carole Benson	Senior Finance Manager

2. Introductions

As the Chair had sent his apologies the Vice Chair chaired the meeting and welcomed Forum members, confirming that there were no new attendees.

3. Minutes of the last Meeting

The minutes of the meeting held on Tuesday 23rd November 2021 were checked and agreed as a correct record of the meeting.

4. Matters Arising from the Minutes (23/11/21)

There were no matters arising.

5. School & Academies Funding 2022/2023

Steven Goodwin presented the Schools & Academies Funding update and explained that the focus of the Forum meeting was to consider and make recommendations on the 2022/23 funding factors that are required to be submitted to the DfE by the 21st January 2022 deadline. The recommendations will also be included in the Council budget setting requirements which go to full Council for approval on 23rd February 2022.

1. Dedicated Schools Block (DSG)

The validated October 2021 pupil census data has been received and the budget figures updated. 2022/23 is the third and final year of the planned £14.5 billion investment in education with the Schools Block receiving an increase of £3.4 million and the High Needs Block an increase of £3 million. There is a decrease of £578k in Early Years due to demographic changes and associated reduction in numbers.

2. Schools Block

a) Formula Unit Values

At the Forum meeting in October 2021, members discussed and agreed the unit values applicable to 2022/23 which are completely in line with the National Funding Formula (NFF) Values. There are no changes to the unit values required following the recent funding settlement announcements so the previously agreed unit values will be applied to the April 2022 formula figures. The unit values were detailed in the report provided.

b) Additional DSG Grant

As part of the Comprehensive Spending Review 2021 a further increase to Bury's DSG has been announced with Mainstream Schools and Academies receiving an additional £4.2 million aimed at contributing towards additional cost pressures schools are facing such as national insurance increases and gas & electricity costs rising. The additional funding will be provided as a separate grant for 2022/23 due to the allocation of grant being announced after the 2022/23 National Funding Formula (NFF) determination. From 2023/24 onwards the increased funding will form part of the overall Schools Block determination. The increased funding to individual settings is derived using the validated October 2021 census data.

c) De Delegation

The discussion of De-delegation of the three items below was deferred at the October 2021 Forum meeting with more information requested regarding the FSM benefits checking.

- Schools of Concern at £6 per pupil
- FSM Benefits Checking £6 per FSM6
- Trade Union Facilities Time £4 per pupil

Steven Goodwin confirmed that the funding generated through the de-delegation for FSM Benefit Checking equated to less than £16,000 for 2021/22 and provides a token contribution via a central recharge to the Benefits Team towards their overall staffing and operational costs. The FSM checks they undertake greatly benefit schools through their validation assessments and information to schools to inform of pupils eligible for FSM which allows them to maximise the Pupil Premium Grant. It is used to support census submissions that the DfE use to determine levels of funding for delegated budgets through the FSM factors, as well as informing the determination of Pupil Premium Grant (PPG) allocations.

Bury's Schools and Academies receive just under £9.1m PPG in 2021/22, of which just under £7.1m relates to validated FSM numbers. The balance of PPG is allocated to schools and academies in respect to Service and Looked After Children.

School Improvement

At the November 2021 meeting a further paper was discussed relating a DfE consultation on how School Improvement Functions were funded. The outcomes of the consultation were published by the DfE on 11th January 2022 and although approximately 80% rejected the proposals, the DfE confirmed that they would be proceeding with reducing the LA School Improvement Monitoring and Brokering Grant by 50% for the financial year 2022/23 prior to full removal in the following financial year. The DfE's paper recommended LA's to de-delegate the funding for their school improvement activities from maintained school budgets.

The total cost of the service is £390,000, the School Improvement Brokerage and Monitoring Grant is £201,956 and Bury's General Fund budget funds the balance up to £190,000. The impact of the DfE decision will see 50% of the grant removed from April 2022, which equates to £100,978.

Steven Goodwin requested Forum to consider and support the proposal that based on Maintained School pupil numbers forecast for 2022/23, the level of de-delegation required on a per-pupil basis divided equally amongst all Maintained Schools regardless of sector, is £7.50 per pupil. There is no significant detail to demonstrate a differential rate per pupil per sector is required at this stage.

Forum acknowledged the importance of the work carried out by the school improvement team but queried academies funding of the LA's school assurance team as they also benefited from the relationships and wider information and highlighted with more schools academizing there was a shrinking amount of maintained schools contributing to the costs. It was confirmed that the LA does support the family of schools as a whole but academies do not benefit from the brokerage work and that Multi-Academy Trusts should be set up to deliver for their own school improvement support.

Forum queried if the LA had asked the academies to contribute towards the funding and it was discussed that three years ago the LA did ask the Multi-Academy Trusts to contribute towards LA systems which supported both maintained schools and academies and this request was refused.

It was confirmed that the LA provided quality assurance visits to all schools in Bury in the last year using Covid monies received to ensure this was disaggregated from costs to schools or school improvement.

As full removal of the Grant is set to be applied in 2023/24 the discussion of de-delegation will be brought back to Forum in October 2022.

RECOMMENDATION 1: Forum agreed to the De-delegated values for 2022/23:

- **Schools of Concern @ £6.00 per pupil**
- **Free School Meals Eligibility Checking @ £5.00 per FSM6**
- **Trade Union Facilities Time @ £4.00 per pupil**
- **School Improvement Brokerage and Monitoring Grant @ £7.50 per-pupil**

d) 0.5% Schools Block Transfer to High Needs

Steven Goodwin explained that following receipt of the DSG funding settlement, validated October 2021 census data, and after updating all Mainstream Schools & Academies 2022/23 funding formula, Forum are requested to consider and recommend a transfer of £715,200 from the Schools Block to the High Needs Block. The transfer equates to 0.5% of the School Block and recognises an essential contribution from Schools and Academies towards helping with the overall cost pressures being faced by the High Needs Block.

Steven Goodwin's emphasised that this was a significant contribution which did not impact on school budgets as the funding formula has been applied 100% to all schools. All schools including academies are contributing and this would also assure the DfE that schools were supporting the deficit recovery.

RECOMMENDATION 2: Based on all information presented Schools' Forum agreed to the recommended maximum permitted transfer of 0.5% of the Schools Block to the High Needs Block for 2022/23.

e) Indicative Headline Funding Allocation

In anticipation of the above recommendation being agreed Steven Goodwin's report detailed the indicative figures for 2022/23.

Primary schools have seen an overall net reduction of 220 pupils which equates to £1,009,400 less DSG Schools Block to the Primary Sector and Secondary schools have seen an overall net increase of 57 pupils which equates to £335,300 increased DSG Schools Block.

Forum queried if there was any information on future demographics for falling rolls and it was confirmed that there was a declining birth rate in Bury forecasted over the next five years. The impact is already being seen in the early years and primary sectors with the secondary schools intake expected to peak in 2023 then fall thereafter.

During the next five years the LA is planning housing developments which will aim to mitigate falling rolls. A previous paper was circulated by Paul Cooke regarding falling rolls and the future impact on schools.

There are concerns about impact on individual schools and there are plans to regularise admission numbers with discussions to take place on exploring ways for individual schools to remain sustainable.

It was suggested that Forum could put into the formula an amount to help schools with falling rolls as well as growth and it was confirmed that the £100k growth contingency could also be used for falling rolls but rules dictate that the funding can only be used for good or outstanding schools with falling rolls.

3. Central School Services Block (CSS)

Forum are required to approve the allocation of budgets included under the CSSB, which was created several years ago in place of the former Education Services Grant (ESG). The former ESG funding was added to the DSG in April 2018.

The only area subject to a reduction of funding is the historical commitments which funds the Safeguarding in Schools Officer for Bury LA.

The Teachers Pay & Pension Grant listed in the funding allocation is for centrally funded employees not directly employed by schools.

RECOMMENDATION 3: Bury's Schools' Forum agreed to the allocation of CSSB budgets as outlined to the applicable services for 2022/23

4. High Needs Block

The announcement of the High Needs Block in December confirmed the anticipated 8% increase and in addition to this the High Needs Block has received a further £1.5 million as part of the Comprehensive Spending Review 2021. The actual overall increase for 2022/23 is £4,531,635 which equates to 13%.

The total High Needs block funding is committed to support applicable ongoing cost pressures including in and out Borough provision at Mainstream, Resourced Provision, Special School, Pupil Referral Unit, Alternative Provision, Independent, Non-Maintained, Post-16, and SEND support services, plus costs associated to volumes of increasing Education Health and Care Plan eligible pupils, increased revenue cost implications for developments of in-Borough capacity and sufficiency of provision/places to support children and young people with SEND, and Inclusion developments.

The Local Authority is required to demonstrate that it can balance within the High Needs block allocation in-year with effect from 2022/23 and then sustain this positive position into future financial years.

Further updates on the High Needs position will be brought to future Schools' Forum meetings, including detailed monitoring reports on the delivery of the Safety Valve agreement. Steven Goodwin suggested an additional Forum meeting to be arranged in March to discuss the funding further and a date will be sent out in due course.

5. Early Years funding 2022/2023 – Hourly Rates (2, 3 & 5 Year Olds)

The Early Years Block has seen a net reduction in funding for 2022/23 of £578,134 compared to 2021/22. This was expected due to demographic changes and reductions in early years age population. However, early years funding is adjusted in-year with termly headcounts so if participation increases then funding will follow.

As part of the Comprehensive Spending Review, the Early Years Block has received additional funding which acknowledges inflation and secures the allocation to support the LA Maintained Nursery School. Funding has increased to £5.67 for 2 year olds and £4.61 for 3&4 year olds.

The hourly rates will remain at the same level throughout the financial year, but the funding can fluctuate due to termly headcounts.

The Teachers Pay and Pension Grant funding for Early Years maintained settings will continue as a separate grant from April 2022 although no allocations have been published at this stage.

The mandatory minimum funding for the LA to pass to providers is 95%, however Bury has always maximised funding to settings and currently only retains up to 3% of the available funding. The retained funding contributes towards central support services such as advisory support, sufficiency requirements, free entitlement eligibility checking and the management and administration of the complex funding formula determinations and statutory requirements.

Forum were asked to recommend the hourly rates. The other unit values announced for the Disability Access Fund (DAF) and Early Years Pupil Premium Grant (EYPPG) are not subject to Schools' Forum consideration

RECOMMENDATION 4: Bury's Schools' Forum agreed to the hourly rates specified for 2, 3 and 4 year olds for 2022/23

6. Business Rates

The funding mechanism for Business Rates is to be centralised by the DfE and top-sliced from Local Authority DSG budget allocations with effect from April 2022. Schools budget allocations for 2022/23 will include an estimate for Business Rates in order for the DfE to complete their first year reconciliation and comparisons to 2021/22.

Schools will still receive the invoice for information only and will not need to pay it.

Schools and academies will need to be aware that their budget notifications will include the Business Rates estimate plus a corresponding deduction and any variations to actual 2021/22 rates bills compared to funding received in 2021/22 will be provided the 2022/23 school budget allocations.

7. Pupil Premium Grant (PPG)

All elements of the Pupil Premium Grant allocations are set to increase on average by 3%. Determinations are aligned to the annual October census for main school funding purposes with LAC PPG determined using the LA Looked After Children return as at 31st March.

6. **DSG Deficit Recovery – Programme Safety Valve (PSV)**

Providing the objectives of the Project Safety Valve (PSV) are achieved, Bury will receive an additional £20 million funding in High Needs DSG over five years with £6 million already received in 2020/21 and £3million confirmed to date this financial year with another £1million due before year end. Bury should then receive another £4 million in 2022/23 and £3 million in both £2023/24 & 2024/25.

Isobel Booter presented the Project Safety Valve PowerPoint and explained that the formal Safety Valve agreement, developed in January 2021, included a deficit recovery profile from 2020/21 through to 2024/25, which factored in £4m additional costs recognition for increased capacity relating to SEND, Finance, Data, and Programme Management requirements over this period. By the end of the 2020/21 financial year further costs pressures that were not factored into the recovery profile resulted in approx £1.9m drift from the 2020/21 initial forecast.

The DfE therefore delayed the additional DSG Safety Valve payments until Bury submitted a more realistic revised recovery plan by the 17th December 2021 to provide assurance that the recovery will get back on track. A substantial amount of work was carried out and Isobel thanked Steven Goodwin for the recalculation of the figures.

The cost pressures were explained to the DfE and reported to Council including:-

- increased high-cost out of borough placements
- increased in-year volumes of Education Health and Care Plans (EHCPs) and associated top-up funding-increased
- in-year special school placements and associated high-cost banded funding.

The DfE have agreed the revised plan and subsequently confirmed the funding for Quarters 2 & 3 of 2021/22.

One of the key priorities for Bury to achieve is ensuring that the High Needs Block is sustainable in-year with effect from 2022/23 onwards. This financial year the LA is not on track but it has reduced from £40.6 million spend in 20/21 to £39.1 million. The key year for developments is 2022/2023 where the deficit needs to be significantly reduced.

Isobel Booler said that figures shown demonstrate how challenging the programme is to decrease spending whilst increasing efficiency, improving services provided and outcomes for pupils. The review allows for different ways of working with opportunities for schools to engage in the process and help develop a whole system approach which addresses all areas of SEND needs and result in positive outcomes. Special schools are engaged in discussions regarding bandings.

The LA wants to be transparent with its planning and the savings being considered as part of the recovery profile were listed and it was highlighted that the clawback of school surplus balances were not included in the savings proposals. Forum thanked the LA for removing the school surplus balances from the mix and said that it would be a relief to some schools. Schools surplus balances are still subject to review as part of the year end process and will be discussed further with Forum at their meetings in March and June.

The inclusion funding was queried and it was discussed that the Secondary Inclusion funding was projected to have no further spend during the Spring Term. It was highlighted that the inclusion hubs help prevent children going out of borough and they have to succeed to stop further issues down the line. The reduced exclusion rates for Bury are now impressive but there are aims to improve further.

Forum asked if the hubs were aware of the savings proposals and Steven Goodwin confirmed that they were aware, but figures have not been shared.

Steven Goodwin attended the Primary Steering Board and explained that the in-year surplus' will be used to help with the deficit recovery and explained that the need is to ensure inclusive practices continue to be developed in schools including for mental health support.

The LA has to make some difficult strategic decisions to address the significant overspend whilst improving services and these will be shared with Forum members in due course. The LA cannot confirm which non-statutory services will be affected at this stage.

The DfE have allocated Bury a total of £3.74 million additional capital funding to support developments required to increase capacity and sufficiency of SEND provision within the borough. Two special free schools are planned along with an increase in resource provision places across Bury.

7. Date of Next Meeting

The Forum agreed that a meeting in March would be useful to work through all decisions including on an individual school level. Steven Goodwin will send out a date in due course and add a March meeting to the annual future dates.

The dates of the next meetings were confirmed as follows:

Tuesday 22 March 2022 – 4pm

Tuesday 14 June 2022 – 4pm

Tuesday 18 October 2022 – 4pm

Tuesday 15 November 2022 – 4pm

Tuesday 17 January 2023 – 4pm

8. Any Other Business

Forum queried the planning application for temporary classrooms put in by Unsworth Academy and it was stated that the school is a new building and similarly to Elton High has found the specification too tight and does not provide enough accommodation for the current intake. There are no plans to increase numbers at this school.

A query was raised regarding SACRE but it was confirmed that a SACRE meeting would be held next week and for the query to be addressed at that time.