

## SCHOOLS FORUM

Thursday 15 December 2022

Present: Chris Tomes (Chairman), Andrew Morrison, Joolz Scarlett and Sarah Cottle

Also in attendance: Councillors Amy Tisi and Donna Stimson

Officers: James Norris, Laurence Ellis, Clive Haines and Tracey Anne Nevitt

### Apologies for Absence

Apologies received from Isabel Cooke.

### Declarations of Interest

No declarations of interest received.

### Minutes of the Previous Meeting

**RESOLVED UNANIMOUSLY: That the minutes of the meeting held on 17<sup>th</sup> November 2022 be approved as a correct record.**

### Budget Monitoring and Forecast 2022/23

James Norris explained that the report was to provide the Forum an update on the financial position for the current financial year (2022/23) as well as a projected outturn and projected balance of the deficit as of 31<sup>st</sup> March 2023.

James Norris then summarised the report, starting with Financial Details / Value for Money (Section 3). He went through the financial position of each schools block budget:

- Schools block: reported underspend variance of £496,000. This reflected the lower requirement to use the pupil growth fund than the budgeted allocation received in 2022/23.
- Central School Services block: reported underspend of £125,000. This was a reduction in the Overhead Child's and Dedicated Schools Grant.
- Early Years block: reported underspend £135,000. This was due to an increase of the receipt of an in-year grant from the previous financial year.
- High Needs block: reported overspend of £559,000. Within the variance of this block, there was a provision for future demand of £400,000.

The overall net underspend was £197,000 in year, which was positive news, according to James Norris, as it was a material movement from the last reported position. The main reason for this change was due to the Deficit Management Plan themes which were introduced in the current and previous financial. The overspend on the High Needs block had been reduced by £474,000 (a 2% movement).

James Norris then explained the Deficit Management Plan themes which lead to the reduced overspend:

- A more robust and challenging process for requests from external providers for inflationary increases.
- The impact of the SEMH (Social, Emotional & Mental Health) service on reducing the number of pupils being excluded.
- The introduction of the resource-based unit.

- ECHP (Education and Health Care Plan) panels including the headteacher in which they took part in the reviewing, helping them understand the financial impact of their decisions.
- Schools were becoming increasingly inclusive.

Despite the reduced overspend, James Norris added that a £557,000 overspend was still being forecasted.

James Norris then explained the next steps on the Delivering Better Value (DBV) programme in which AfC (Achieving for Children) were actively engaged in. In December 2022, AfC submitted 6,000 records of data to DfE (Department for Education) which would form part of a detailed analysis that DfE were undertaking on AfC's behalf. A main priority for AfC in the next 6-12 months would be to continue working closely with DfE on the DBV programme.

The Vice-Chairman asked if the £559,000 overspend for the High Needs block was a 'worst case scenario'. James Norris confirmed this forecast was the best estimate of the outturn position, explaining that it was the estimate for 31<sup>st</sup> March 2023. This included a provision for future demand between November 2022 and 31<sup>st</sup> March 2023 which was based on previous financial years.

The Vice-Chairman then asked if there were any results on the Delivering Better Value (DBV) programme. James Norris replied that it was still early to assess any impact. However, he stated that the results of the Deficit Management Plan themes were running in parallel and were already being implemented. These were having an impact on the overall forecast position.

Joolz Scarlett asked if there were any lessons learnt from other local authorities regarding the submission of files to DfE. James Norris explained that the DBV was intended to aid local authorities with deficit balances. He stated that there were other local authorities who were ahead in the programme compared to RBWM, but there were other authorities which were behind. He also conveyed that AfC had reached out to other local authorities in Berkshire to acquire their input into the data sharing with DfE. James Norris also stated that some AfC officers would be attending workshops with other local authorities to share ideas and feedback.

Joolz Scarlett then stated that risks needed to be recognised in regards to the withdrawal of the schools' white paper as well as the green paper potentially not being implemented. Clive Haines, Deputy Director for Education, responded that AfC's five-year SEND strategy plan contained much of the green paper and was still being implemented.

The Forum noted the report.

### Provisional Dedicated Schools Grant & Schools Formula 2023/24 - consultation update

James Norris started off with the list of recommendations for the Forum to approve:

- Funding limit factors of the school budget allocation 2023/24
- Proposed funding approach for 2023/24
- The Central School Services Block budgets 2023/24
- Proposed de-delegation rates for 2023/24
- Notes the planned Early Years formula consultation 2023/24

James Norris then summarised sections of the report. Regarding the analysis of consultation results (Section 4), 43% of schools had responded to the consultation, which James Norris stated was a positive result. He then went through the results of the consultation:

- Minimum per pupil level funding (MPPL) guarantee to remain 0.5% was supported by 89% of respondents.

- Continuation of capping and scaling received a 65% support from respondents despite some pushback from some schools.
- Introduction of a new compulsory sparsity factor at 10% received a 62% rather than the proposed options of a 25% or 50% increase.
- Application of any headroom received 42% support for the preferred option of adjusting the lump sum.
- Increasing FSM Ev6 unit rates to NFF level for 2023/24 received 100% support.
- Increasing the IDACI bands C to F unit rates to NFF 2023/24 levels was supported by 52% of schools.
- Preferred model schools received a mixed response with 44% of responses supporting Model One.
- Proposed changes to the Notional SEN factors received 42% of support with 46% of schools being uncertain about this.

James Norris moved onto Growth Funding (section 5). He reported that the growth funding for 2022/23 was £705,000. As per the previous report, £496,000 was already released into the forecast for the 2022/23 financial year. Presently, the financial allocation for 2023/24 was not confirmed but was expected to be received in December 2022, and then aim to share this in the next Schools Forum meeting in January 2023.

Moving on, James Norris stated that the Central School Services Block (section 6) and the De-Delegation Rates (section 7) would require the Forum's approval.

On Early Years National Funding Formula (section 8), James Norris stated that the early years consultation would be sent out in January 2023 to all providers.

Councillor Tisi asked for an explanation of the different models in question 7 of the consultation. James Norris replied that he could have them recirculated after the meeting.

The Forum went onto approving the recommendations.

**UNANIMOUSLY RESOLVED: The Forum agreed the following:**

- **Funding factors of the school budget allocation 2023/24 as per the consultation and current report and previous report from the previous meeting in November 2022.**
- **Proposed funding approach for 2023/24**
- **The Central School Services Block budgets 2023/24**
- **The proposed de-delegation rates for 2023/24 as set out in paragraph 6 and table 5 for secondary maintained schools**

Regarding the proposed de-delegation rates, James Norris explained that this only applied to both primary and secondary maintained schools. Due to the lack of member representatives from primary schools during the meeting, James Norris suggested that the Forum approve the de-delegation rates for maintained secondary schools. As for the maintained primary schools, James Norris stated that he may have to bring a similar report to the next meeting in January 2023 where hopefully a representative from a maintained primary school could attend.

James Norris also suggested that if the next meeting in January 2023 did not have a primary maintained school representative, then as de-delegation rates for maintained primary schools had not changed, they would be approved.

Clive Haines suggested Joolz Scarlett could be the representative to approve the proposal as, while she was representing a special needs school, it still took in primary school pupils. The Vice-Chairman suggested to delay the approval to the next meeting whereby a maintained primary school representative would be sought out; but if one could not be acquired, then Joolz Scarlett would do the approval. Joolz Scarlett stated that the proposal did not affect her budget and thus was uncertain whether she could give her approval; but added that if she was allowed to, then she would approve it.

James Norris commented that as rates had changed, this would be a safe approach.

The Forum noted the report.

The meeting, which began at 2.02 pm, finished at 2.31 pm

Chair.....

Date.....