SCHOOLS FORUM

Thursday 18 January 2024

Present (virtually): Chris Tomes (Churchmead) (Vice-Chair in the Chair), Sarah Cottle (Maidenhead Nursery Federation), Isabel Cooke (White Waltham), Ben Bausor (Early Year PVI), Andrew Morrison (Furze Platt Senior), Catherine Page (Oldfield Primary), Neil Dimbleby (Altwood) and Eddie Neighbour (Pioneer Academy).

Officers (virtually): Clive Haines, Tracey Anne-Nevitt, Louise Dutton, Sarah Ward and Laurence Ellis

Apologies for Absence

The Vice-Chair in the Chair, Chris Tomes (Churchmead), welcomed everyone to the meeting and attendees introduced themselves.

Apologies were received from Rebecca Askew, Senior Specialist Educational Psychologist (Achieving for Children, AfC).

Declarations of Interest

No declarations of interest received.

Minutes of the Previous Meeting

RESOLVED UNANIMOUSLY: That the minutes of the meeting held on 14th December 2023 be approved as a correct record.

Finance Update 2023/24

Louise Dutton, Head of Finance (Achieving for Children, AfC) summarised Table 4.5 (page 13 of the agenda) which outlined the budget for 2023/24.

- The overall DSG (Designated School Grant) budget was £75.663 million while the projected spend to the end of the financial year was £75.852 million, which resulted in an overspend of £252,000, a slight increase of £62,000 compared to the previous update in November 2023.
- The High Needs Block had an adverse effect £106,000 with the overspend being projected to be £1.218 million. This was due to an increase in demand for AfC independent specialist and private providers.
- The Early Years Block experienced an underspend of £411,000, an increase of £54,000 from the previous month. The main reason was because the latest census data indicated that there would be larger underspend compared to what was reported in November 2023.

Overall, there was a deficit DSG balance reserve of £1.106 million and this was projected to increase to £1.358 million.

The Chair asked whether there were any actions required in order to reduce the deficit. Louise Dutton replied that the Borough was formulating a deficit management plan, whereby the Borough and schools would collaborate to bring the deficit down. This plan was submitted to the DfE (Department of Education) just before Christmas 2023 and would be brought forward to Schools Forum once it was signed off.

Clive Haines, Deputy Director for Education (AfC), added that the Borough was part of the Delivering Better Value in SEND programme due to its deficit though it was not part of the 'safety valve' in which local authorities with high deficits were part of. The Borough was allocated £1 million in order to support a programme to reduce the deficit around the High Needs Block which had the most effect on the budget. He also informed that there would be a launch of the pilot project in February 2024 in which schools were invited to take part in; and this would focus on ordinary provision in primary and secondary schools. Clive Haines added that the Schools Forum would be updated on the program.

The Forum noted the report.

<u>2024-25 Early Years Funding Consultation proposals and DSG funding update</u>

Tracey Anne-Nevitt, Business Finance Partner for Schools and Early Years (AfC), went through her report. She explained that central government intended to expand the 2-year-old offer from April 2024 and under-2s entitlement from September 2024. Central government gave the Borough a target to pass-through at least 95% of the funding, and the Borough was required to do an annual consultation.

Tracey Anne-Nevitt then pointed towards Table 4 (page 26 of the report), which detailed the funding allocations in which the Borough was to receive per hour for each of the entitlements. She informed that the table did not include the Early Years Pupil Premium and the Disability Access Fund, with the latter being a ringfenced area.

Tracey Anne-Nevitt then discussed the proposed percentage allocations (Table 5, page 26). With the 95% funding pass-through in mind, AfC decided to propose a 4% retention; therefore, leaving 96% to pass through to providers. She presented the 2 models:

- Model A – Base rate of 85% of the hourly rates, supplements at 2% and SEN Inclusion Fund of 2%.
- Model B – Base rate of 87.5% of the hourly rates, supplements at 7% and SEN Inclusion Fund of 1.5%.

The 2 proposed supplements included quality and deprivation, which was currently on offer for three-to-four-year-olds.

There was an increase in demand and referrals for SEN Inclusion; meanwhile, AfC had a low budget in this area. From this, AfC proposed that the provider allocation increased, which was reflected in the aforementioned models.

Table 6 (page 27) listed the amount per hour which the providers could expect to receive under the 2 models and included the Base Rate estimate and the Deprivation and Quality supplements. Each setting would receive a Base Rate and one of the Deprivation rates and a Quality rate, depending on which banding their fell.

Table 7 (page 38) detailed how the block funding would be allocated over the entitlements by percentage and the amounts.

Tracey Anne-Nevitt then went over the proposed consultation questions to be sent out to all providers, namely PVI (private, voluntary and independent), the child minders, and the maintained nursery classes and schools. The proposed questions were:

1. Do the providers support a local cap on the central element at 4% for 2024-25, ensuring further funding would be available for higher hourly rates / SEN inclusion funding to providers?
2. Do the providers agree with the RBWM proposed approach to fund all entitlements via a base rate and two supplements: deprivation and quality?
3. Do the providers agree to fund the same rates for two-year-old disadvantaged pupils and two-year-old working parents?
4. Which of the two models (A and B) do the providers support?

5. Do the providers support the proposed inflation uplift for the SENIF matrix values of 4%?

The Chair asked if question 5 was related to the 2 proposed models or were separate. Tracey Anne-Nevitt answered that the question was separate to the models. She then pointed towards a table with the SENIF Matrix Values (page 30) and there were bands for Low/Emerging (£600 per term) and Moderate (£1,060 per term). From this, the question which Tracey Anne-Nevitt sought to ask was what the new rate should be going forward termly and annually with inflation taken into account.

Ben Bausor (Early Year PVI) expressed appreciation to Tracey Anne-Nevitt for the report and believed that it was good that the Borough as putting as much funding in providers as possible.

The Chair asked about Table 7, pointing out that there were 2 models but had the same financial outcome. Tracey Anne-Nevitt replied that the total amount which was to be given out needed to return to the block without the ring-fenced items. However, there would be different amounts going through the entitlement between Models A and B. As such, it would change the amount for the SEN Inclusion Fund, but the Central Element and total amount would remain the same.

Sarah Cottle (Maidenhead Nursery Federation) asked whether there was a 'local authority steer' if there was a 50-50 split in the choice of models. Tracey Anne-Nevitt replied that the final decision laid with the Borough. In the event of a 50-50 split, AfC officers would discuss the next steps, as well as look through the comments.

Neil Dimbleby (Altwood) queried on the rate figures appearing to be at different amounts and not adding up in Table 6. Tracey Anne-Nevitt responded that this was because there was a different quantum for the supplements. In Model A, 9% of the Block would go through, while it would be 7% for Model B. AfC had reduced some of the rates and then work out what the quantum was based on the high medium, all the combination and how many hours currently go through each element. Despite this, AfC were aware that things would change in-year and that it depended on the use of the entitlements and nay moves in banding; therefore, they would review this and consult if there was any change.

Ben Bausor commented that the supplements would be helpful as the incentive was for settings to invest in staff, namely a higher quality provision would lead more funding.

The Forum noted the report.

2024-25 Schools Funding Update

Tracey Anne-Nevitt introduced the report by informing that AfC received an updated toolkit from central government at the end of December 2023, containing data from the recent October 2023 census on school funding, as well as receiving the updated dedicated schools run block funding. Reviewing the data and information, AfC decided to provide a snapshot of the movement of data between 2023-24 to 2024-25 APT.

Table 5 (page 7 of the supplement) showcased the proportion of pupils in the different formula factors and the movement between the years, in which there had been significant increases:

- There were pressures on free school meals (FSM) which had increased by 14% in the secondary sector (compared to 70% in the previous year).
- English as an additional language (EAL) had increased by 19% in the secondary sector.
- Mobility had increased by 90.6% in the primary sector and 79% in the secondary sector.

Going through the way the unit funding had been allocated in the primary and secondary sectors, Tracey Anne-Nevitt informed that this was based on previous year's funding allocations plus inflation and had not been updated for the recent changes in characteristics. Therefore, any changes in data had placed pressure on the allocations. As referred to in the previous report in November 2023 and the outcome of the consultation in December 2023, AfC were also seeking to get closer to NFF (national funding formula) values, though the changes in data had made this more difficult.

Tracey Anne-Nevitt then explained that there was a proposal to use some of the pupil growth fund allocation for 2024-25, which stood at £828,000 overall. After reviewing the estimate of what was required based on demand, discussing with an officer on bulge classes and the funding of places, the proposal was for £414,000 of this unrequired fund to go into the schools formula by which AfC could allocate additional funding to the formula factors. As a result, AfC would be much closer in reaching NFF. In addition, they would retain pupil growth funding to cover the estimated costs for the pupil growth and bulge classes but make a movement to the schools formula.

The Chair asked for clarification that reducing the growth fund was based on an informed choice on the situation within the Borough. Tracey Anne-Nevitt confirmed this, elaborating that AfC had looked at the planned numbers of surplus places and where the pressures were. She also informed that Ben Wright, School Places Leader (AfC), had planned how many extra places or bulge classes he would require. In addition, AfC estimated how much was needed of the growth fund based on this and how much we could release into the schools formula funding. She pointed towards Appendix C of the report, which had a draft showing the increases each school would receive if funding from the pupil growth fund was released into the school's formula, adding up to the £414,000.

Neil Dimbleby highlighted some errors in the supplementary report which needed to be corrected before being publishing:

- At 1.3 (page 4), the report said 'On the 19th December *2024*' rather than 2023. This was also the case with 4.1 (page 5).
- At 1.5, the report says '2024-24' rather than 2024-25. This also occurred at 4.5 (page 6).

ACTION: Tracey Anne-Nevitt to correct the errors of the report.

The Forum decided to approve Column E.

AGREED UNANIMOUSLY: To approve Column E to reduce the growth fund and increase the schools funding.

The meeting, which began at 2.00 pm, finished at 2.32 pm

Chair……………………………………

Date…………………………………........