

SOMERSET SCHOOLS FORUM

Minutes of a Meeting of the Schools Forum held at The Victoria Park Community Centre, on Wednesday 27 November 2019 at 1.30pm

PRESENT

Primary headteachers &

Governors:

Susan Brewer
Morwenna Dunstan
Matthew Gardner
James Lamb
Helen Hazell
Alison Crudginton
Chris Axten-Higgs

PRUs:

Jo Simons

Academies:

Peter Elliott – chair

Special Academies:

Non-school members:

Rachel Parish – Early Years Provider Representative
Kim Newstead – Unison Schools Convenor

Observers:

Oliver Bagana – NASWT
Helen Taylor (on behalf of Richard Culham)
Robin Head Somerset National Educational Union

Officers:

Faye Purbrick - Cabinet Member for Education & Council Transformation
Julian Wooster – Director of Children’s Services
Annette Perrington, Assistant Director Inclusion
Elizabeth Watkin, Strategic Manager, Chief Accountant
Sian Kenny, Strategic Manager, Finance and Business Partnering
Ian Rowswell, Head of Support Services for Education
Phil Burner, Saphto Exec and Liason Officer
Mike Bryant, Democratic Services Team Leader
Andrew Randell, Senior Democratic Services Officer
Frances Nicholson – County Councillor (Observer)
Dave Farrow – Head of Educational Outcomes
Lucinda Searle – SAPHTO Executive Officer

Apologies for absence: Mark Ruffett, Naoimi Philip, Richard Cullum and Barbara O’keefe.

1 **Welcome, Introduction and Apologies** – agenda item 1

The Chair welcomed everyone to the meeting.

2 **Minutes** – agenda item 2

The minutes of the meetings held on 9 October were signed off as a correct record.

3. **Director of Children’s Services Update**- agenda item 3

The Director of Childrens Services, Julian Wooster, presented an update.

Headline results in 2019 indicated a decline in Somerset's Children's Services performance. The indicators were set out as performance across the Education Framework, New ofsted league table and multiple deprivation indicator. Somerset was also ranked amongst the lowest in the national table of the inclusion index.

Proposals in arranging a conference to consider the issues, working together to form a strategy and approach to address the situation was considered. By mid December a new central government would be formed and new department for Education to work with and address these issues. It was recognised there was a correlation between the best performing areas receiving the highest funding.

Somerset County Council were due a SEND inspection, with it recognised that attainment results and inclusion scoring needed to improve. An update relating to the performance and progress of attainment results would be captured and reported at future meetings.

Action: SEND Arrangements would be Scrutinised and opportunities provided to visit schools and evidence best and understand the issues, a Somerset Inclusion Index would be developed alongside this.

4 **SSE Update** – agenda item 4

Ian Rowswell presented a number of slides updating the Background, Reserves and Financial Position to date. The update set out the use of reserves and Governance around SSE.

Following on from the presentation around the principles for SSE reserves the Somerset Client Group had considered the proposal that they operate as a sub group of Schools Forum acting as an Advisory Board on SSE and traded services to schools. This would also include consideration of options around use of any surplus SSE reserves. The Client Group were supportive of this proposal. A further meeting had been arranged with Lizzie Watkin around the level and arrangements for SSE reserves; with a plan to produce a report outlining further detail of proposals for Jan meeting.

National changes to the arrangements for NCS is seeing a number of providers step away from that provision. The changes were being assessed along with impact on the SSE Outdoors service.

SSE annual conference in March at Dillington House was now live on the website – focusing on activities and services that supported a broader curriculum and both

academic and character education. Schools were now able to book a place and preferred workshop.

The SSE Governance team had been shortlisted in the ICOSA national Governance awards for Service Provider of the year – up against orgs such as PWC. The awards were being confirmed at a ceremony tonight.

Action: The forum noted the update.

5 **Funding Update** – agenda item 5

The Forum considered the Funding Update report and key points were summarised by Sian Kenny, Strategic Finance Manager. The DfE had published the 2020-2021 National Funding Formula Tables for Schools and High Needs on the 11th October 2019.

The following announcements have been made on education funding for next year:

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- Increases for the schools and high needs blocks across three years.
- Additional funding for increases to teachers' pay.
- Extra funding for 16 to 19-year-olds next year.
- Extra funding for early years next year, now confirmed as 2 year old
- funding will increase by 8p to £5.28ph and 3 & 4 year old funding
- increase by 8p to £4.38ph.
- Local authority and school-level illustrative allocations.
- Pay and pension allocations for Sept 2019 to March 2020.

It was highlighted that the Funding Update was considered at the Technical Working Group held on 19th October.

Some members of the Schools forum expressed concerns about not having received the consultation relating to the de-delegation and education management deductions. Thirty-two schools had participated between 12th and 26th November, which represented 12% of schools. Initial feedback was set out from the consultation.

Costs associated for academies providing Religious Education (SACRE) were considered, these were not recovered or taken into account for academies, maintained schools were charged for this provision.

Following debate the Forum voted on the proposed recommendations. Whilst recommendation A was noted, in respect of recommendation B there was no majority in favour as voting was tied. Consequently recommendation B was not approved by the Forum.

Action:

- a) The Schools Forum noted the DfE Guidance on the National Funding Formula for Schools and High Needs.
- b) The schools forum did not approve the Education Management Funding for 2020/21.

6 DSG Recovery Plan – agenda item 6

An update was provided and options presented to demonstrate potential impact of provisional allocations against the deficit recovery plan over an extended five year timeline.

Debate

- It was recognised that there remained variables in the landscape that need more detailed consideration in order to fully review the deficit recovery plan.
- It had been determined that the deficits were experienced due to a combination of a lack of funding and an increase of demand from the high needs block.
- In relation to the consultation published on the 18th November, concerns were expressed over questions needing to be more specific and only a 7% response rate for primary schools. The overall response rate had increased from previous years.
- It was recognised that high needs arrangements would need to change, the original deficit recovery plan would need to continue to support high needs. Additional funding should not be used to pay off the deficit.
- Discussion in relation to the underspend on growth funding for the schools block would be followed up at the technical working group.
- Concerns were expressed that those needing Early Help Assessments were losing out due to these not being followed up when required. This was considered a responsibility for all providers with schools clear around the challenges of inclusive practice.
- Options A to G (under item 11) were set out along with the implications of these, with the aim of reducing ongoing pressures to address the deficit, elements included additional funding from the schools block.
- All board members were encouraged to attend the next meeting of the technical working group.

Action:

A) Schools Forum resolved not to support a transfer of £237,000 from the Schools

Block to the High Needs Block for 2020/21

B) The Schools Forum requested that the DSG recovery plan options be refreshed and reviewed by the Technical Working Group.

7 Budget Monitoring 19/20 – agenda item 7

Position against month 6 was reported below and formed part of budget monitoring.

The forecast outturn position for the Dedicated Schools Grant in 2019/20 (excluding delegated schools budgets) is a £2.721m overspend.

The cumulative deficit brought forward from previous years is £6.702m. With the additional of the projected in year overspend this will increase to £9.423m by the end of 2019/20

Headline Figures Included

- Schools De-delegated Services reported an £0.005m underspend.
- Central Schools Services Block (excluding de-delegated) reported an £0.069m underspend.
- Early Years Block reported an £0.113m underspend
- High Needs reported an £2.908m overspend (based on 179 places)

The level of reserves brought forward from 2018/19 is a deficit of £6.702m, balances for each block can be found in the table in section 1 above.

There are currently no requests for use of reserves and none expected in 2019/20 given the overall DSG deficit position.

Action:

The Forum noted the budget monitoring update:-

8 Pension Update – agenda item 8

The Somerset LGPS had a triennial valuation process resulting in the pension fund actuaries making an assessment of the required employer contribution rate for the forthcoming 3 years and where applicable the value of the lump sum contributions to be made for the forthcoming 3 years.

All entities that form part of the Somerset Pension Fund were affected by the triennial valuation and the specific changes for Somerset County Council were detailed. These changes affected all Somerset LA maintained schools where they had employees that join the Somerset LGPS.

There was no other option than to ensure communication was made to ensure all Somerset LA Maintained schools understand the financial implications to ensure they can set a realistic and deliverable budget for the financial year 2020/21.

The actuary of the Somerset LGPS confirmed that for Somerset County Council the employer's contribution rate and deficit lump sum were set out:

Financial Year	Employer rate	Change	Lump Sum	Change	Overall change
2020/21	18.1%	+2.6%	£9.331m	-£3.475m	+0.2%
2021/22	18.1%	-	£9.671m	+£0.340m	+3.6%
2022/23	18.1%	-	£10.024m	+0.353m	+3.6%

The figures set out were for Somerset County Council as a whole and the impact on individual schools could differ depending on any proportional change of staffing levels (of the staff within the LGPS) across the whole council. The above overall percentage change figure would be taken as indicative only.

Action:

The Forum noted:

- The change in employer's contribution rate for Somerset County Council for 2020/21 from 15.5% to 18.1%, or an increase of 2.6%
- The change in value of the Pension Deficit Lump sum payment for Somerset County Council for 2020/21 from £12.806m to £9.331m, or a decrease of £3.475m
- The overall pension increase for 2020/21 of 0.2%
- The changes for future years (2021/22 and 2022/23) as detailed in section 4

9 Technical Working Group Update – agenda item 9

The group were provided with the revised unit values published in October as part of the National Funding Formula (NFF) for 2020/21. The updated values for 2020/21 have been uplifted by an average of 4%.

In 2019/20 a decision was taken to adopt all of the NFF values in Somerset's funding formula in anticipation of a hard national formula being implemented in the near future.

TWG supported a proposal that the revised NFF 2020/21 values be adopted in Somerset's funding formula

Somerset also adopted the minimum per pupil funding (MppF) levels in 2019/20. These values have increased in 2020/21 as set out:

	2019/20	2020/21	Increase	%
Primary	£3,500	£3,750	£250	7.1
Secondary (KS3)	£4,600	£4,800	£200	4.3
Secondary (KS4)	£4,800	£5,300	£500	10.4

The Department for Education released a consultation that opened on the 10th September and closed on the 22nd October that sought views on making the national MppF levels mandatory to use in local authority funding formulae from 2020/21. Due to purdah the outcome of this consultation is unknown but we have been advised to assume this will become mandatory. Any local authority choosing not to adopt the values would have to submit a disapplication to the Secretary of State for Education.

TWG supported a proposal that these values be adopted in Somerset's funding formula:

Action:

The Schools Forum noted the discussion and recommendations made by TWG:

- Somerset adopt the 2020/21 National Funding Formula (NFF) values
- Somerset adopt the national Minimum Per Pupil Funding levels (MppF)
- Minimum Funding Guarantee is set at 1.84% (maximum in range of 0.5% to 1.84%)
- Capping is not implemented for 2020/21 (if affordable)
- Mobility factor be considered for implementation in the local formula in 2020/21
- Looked After Children (LAC) factor continued to be excluded from the local formula.

10 Early Years Sub Group Update – agenda item 10

The paper provided an update from the Early Years Sub Group which met on 6th November and considered the budget position as at month seven.

Appendix A detailed the response from the consultation that ran from 25th September to 25th October 2019. This report was discussed at the sub group meeting on the 6th November. It was noted that less than 20% of providers responded to the consultation which did not meet the criteria that sub group had put in place. The response from the consultation was therefore taken into consideration when making their recommendation. The recent announcement by the DfE about the uplift to the Early Years Base Rate for Somerset of £0.08p from April 2020 was also considered when making their recommendation. The Sub group also considered the increase in the base rate to all providers by taking away the quality supplement. The overarching reason for the cessation of any quality supplement, that Sub Group concluded, was

to reinstate equality of funding for all providers which is especially important now as the current funding rate is low. A requirement of the Early Years Sub Group was to ensure, in addition to the Minimum Funding Guarantee, a package of business support be put into place to support settings in need of this. It was agreed that this would be discussed at the next Early Years Sub Group.

Action:

The Schools Forum noted budget position as at month seven.

The Schools Forum agreed the recommendations of the Early Years Sub group to cease to pay the quality supplement element of the Single Funding Formula for all eligible qualifications and for the funding to be added to the base rate.

11 High Needs Working Group Update – agenda item 11

Position against month 6 was reported and formed part of month 6 budget monitoring

Type of provision	Budget	Projection	Overspend/ Underspend
Early Years	£1,274,100	£1,283,200	£9,100
Mainstream - pre 16	£7,376,600	£7,394,249	£17,649
Specialist Units - ASD	£2,371,500	£2,378,900	£7,400
Specialist service HI / VI	£966,700	£992,800	£26,100
PRUs - PEX	£2,592,000	£2,467,600	-£124,400
PRUS - HN (Tone + Specialist Provision)	£657,000	£657,000	£0
PRUS - Medical / Hospital	£1,899,000	£1,899,000	£0
Behaviour Partnership	£2,487,000	£2,487,000	£0
Maintained Special and Free Special Schools	£16,752,300	£17,377,285	£624,985
NMSS and Independent	£10,569,600	£13,164,696	£2,595,096
FE post 16 (Colleges & ISP)	£4,409,600	£4,162,000	-£247,600
Vulnerable groups	£72,100	£72,100	£0
Total	£51,427,500	£54,335,830	£2,908,330

The main overspend projected continued to be the cost of placements at independent and Non-Maintained Special Schools; the projection for month 6 was based on 179 school placements. This continued to be in line with expectations set out in the deficit recovery plan. Special School Top Up funding was projecting an overspend of £0.625m, based on 757 children and represented an increase since month 5 of £0.374m.

A request was made by the Assistant Director of Children's Services for members of the Forum to attend the next meeting of the Technical Working Group scheduled on 10th January at 9:15. Items relating to High Needs and DSG reserves were due to be considered at this meeting.

Action:

- to note the outturn position Month 6
- to note the indicative National allocations
- To note High Needs Sub Group comments on the impact of the indicative allocations on strategic approach to the Dedicated Schools Grant recovery plan requirements
- To note submission of place numbers for Academies and Special Free Schools.

12 Any other business – agenda item 12

There was no other business.

The meeting ended at 3.31pm