

**SCHOOLS FORUM**  
**VIRTUAL MEETING**  
**HELD ON 28<sup>th</sup> JUNE 2022**

**PRESENT:**

**Primary Maintained School Headteacher:** Mrs B Atkinson

**Primary Academy Representative:** Mrs S Richardson

**Primary Governor:** Mrs M Dowson

**Secondary Maintained Headteacher:** Mr R Henderson

**Secondary Academy Headteachers:** Mr S White, Mrs G Booth and Mrs L Spellman

**Special School Representative:** Mrs C Thomas

**Pupil Referral Unit:** Mrs E Carr

**LA Representative:** Councillor C Clark

**14-19 Representative:** Mrs L Graham

**Observers:** Councillor L Evans  
Mrs L Marron

**OFFICIALS:** Mr A Bryson – Chief Accountant  
Mr M Gray – Director of Children's Services  
Mr G Waller – Senior Accountant  
Miss K Gallagher - Secretary to the Forum

1. **APOLOGIES FOR ABSENCE**

Apologies for absence were received from Mrs C Taylor, Mrs M Williams and Mrs A Swift

2. **DECLARATION OF INTERESTS**

Members were invited to declare any personal or business interests they may have in any item included on the agenda.

No interests were declared.

3. **MINUTES OF THE LAST MEETING – 21<sup>st</sup> January 2022**

RESOLVED that the minutes of the meeting held on 21<sup>st</sup> January 2022 be approved.

4. **MATTERS ARISING**

There were no matters arising.

5. **FINAL DEDICATED SCHOOLS GRANT AND SCHOOLS OUTTURN 2021/22**

A copy of the schools budget monitoring report for 2021-22 and supporting appendices had been circulated prior to the meeting to review.

The purpose of the paper provides members of the Forum with the outturn position of the

school's budget and provides an overview of the Maintained School Balances for the 2021-22 financial year.

The Appendix 1 to the report shows the planned spend against the actual outturn for 2021/22 on the schools budget. It had been noted that the figures were all prior to any academy recoupmnt. Overall, there was a £5.48m deficit which includes a brought forward overspend of £6.05m from 2020/21. This represents a reduction of £0.57m across the financial year and £0.662m reduction in the final quarter compared with the projected £6.14m overspend presented to the Schools Forum 21st January 2022. The reasons for significant variances between planned and actual spending for the full year were outlined for Schools Forum Members.

The in-year net saving (£571k) which was made up of £1.287m planned in-year High Needs saving, offset by a £1.047m in-year High Needs overspend but also offset by savings of (£0.331k) on other DSG areas (including £23k on de-delegated items as outlined below). Therefore, it had been reported that the overall cumulative deficit of £5.480m has been carried forward into 2022/23.

Mr A Bryson reported that it had previously been clarified at Schools Forum that should there be an underspend on any of the de-delegated services then it would be a Schools Forum decision on how the outstanding funds would be spent. Therefore, a recommendation was made that the savings were utilised against the DSG deficit.

With regard to School balances, it was reported that the overall maintained school balances now stand at £4.382m. Mr A Bryson reported that this was a decrease of £0.631m between 2020/21 and 2021/22 and represents 8.95% of the 2021/22 budget.

Members of Schools Forum were informed that, on prima facie evidence there were 12 Primary and 1 Secondary school holding excess surplus balances i.e., with balances above the 8% and 5% thresholds. This was a decrease of 2 in the Primary Sector and the same number in the secondary sector compared to 2020/21, and of these schools, all have requested permission to utilise these balances. These have subsequently been approved by the Authority. It had been highlighted that, as of 31st March 2022 no schools were carrying a deficit balance. This was the same position on 31st March 2021.

RESOLVED that the schools Forum

- a) Agree that the unused balance on the de-delegated items (as per paragraphs 6 and 7) be utilised against the DSG deficit.
- b) note the final position for 2021/22 and that the underspend will be used against the significant cumulative deficit in the Dedicated Schools Grant.

## 6. HIGH NEEDS UPDATE REPORT

The High Needs funding report and supporting appendix had been circulated prior to the meeting. Mr A Bryson outlined the report which provided an update on the financial position for High Needs factoring in any recent funding announcements. The report focused on the following areas.

- Spending Pressures

High Needs pressures in 2021/22 have related mainly to the following:-

- Continuing increase in the number of Agency placements
- Additional top-ups, placement costs and one-off funding for pupils in SBC Special Academies (Although this investment in local places should see a reduction in higher cost out of area placements in the medium to long term).

- Mitigations relating to increasing Joint Commissioning and associated Health Funding contributions have not been met.
- Increase in the number of pupils staying on to post-16 / post-19.

Mr A Bryson reported, as noted in the Outturn report presented earlier within the meeting, the main reason for this shortfall was that expenditure within the High Needs Block exceed budget by £1.047m during the year.

- High Needs Funding 2022/23
- High Needs Position

As per the current high needs medium term financial plan, which had been circulated at Appendix 1. The figures which exclude any assumed future block transfer show that high needs expenditure is expected to rise from £31.969m in 2021/22 (see table in paragraph 20) to £34.814m in 2022/23, then increase to £35.644m by the end of 2023/24 and then up to £36.175m by the end of 2024/25.

Mr A Bryson reported that based on the current MTFP forecasts presented in Appendix 1 it is estimated that there will be a funding surplus of £1.701m in 2022/23, £1.902m surplus in 2023/24 and £2.494m in 2024/25. These surpluses will be utilised to reduce the current DSG deficit.

- Safety Valve' Intervention Programme 2022-23 for Local Authorities

Mr M Gray outlined the intervention programme for members of Schools Forum.

- High Needs Addressing the Position

To address the situation a number of measures to reduce expenditure are being undertaken including the following.

- a) Enhanced Maintained Schools (EMS) continue to evolve, to support provision for children locally and reduce pressure on more specialist placements. These centres of excellence provide peer outreach to other settings to assist in growing capacity to meet needs when they first present.
- b) A Mapping exercise is underway based on historical SEND data (3 calendar years). This will assist the Local Area to 'predict' a wide range of future needs with the required provision to meet need. Once our methodology becomes embedded in the way we work future training/early identification of gaps in available provision should be able to be developed to fill those gaps. Training and capacity building is already underway, and this will be able to be focussed on the areas of greatest need/future predicted cost.
- c) Reduction in Out of Area/Independent Special School Placements through the development of 'In Borough' provision.
- d) Tees Valley Free School which will reduce the number of children requiring much higher cost independent special school provision (SEMH/ASD) will complete and be operational from Autumn 2023. It is a Sponsored academy secured with River Tees Multi Academy Trust. Stockton LA are heavily involved in the planning and appointment of key staff (Principal has been appointed).
- e) Pathway Development Centre places commissioned to promote opportunities for continued supported mainstream placement after a Permanent Exclusion have been very successful in primary. The LA is

- currently out to commission additional primary PDC's.
- f) Commissioning of ASD outreach service (NEAS) to enable advice support and guidance to be available as soon as needs are identified.

- Risk

The potential areas of risk had been identified within the report.

RESOLVED that the High Needs funding report be received and noted.

## 7. DfE UPDATES / CONSULTATIONS

A copy of the DfE Updates and Consultation Report was shared for School's Forum members to review. Mr A Bryson provided a detailed overview of the report as outlined below.

- In July 2021 the DfE published a consultation document entitled 'Fair school funding for all: completing our reforms to the National Funding Formula (NFF)'. This consultation outlined the DfE's plan to start moving to a school level national funding formula from 2023/24. The results of the consultation were presented for information.
- Following on from the results of the 'Fair school funding for all: completing our reforms to the National Funding Formula' as detailed above, on the 7<sup>th</sup> June the Government published the next National Funding Consultation. This current consultation focuses further on the detail of the implementation of the direct NFF.

This current consultation focuses further on the detail of the implementation of the direct NFF. It does not restate DfE's proposals for reform, which were outlined in the first consultation and the response. The purpose of the consultation was outlined for information.

Members of School Forum were informed that there were 33 questions relating to the NFF in total, which could be found at Appendix A of the report.

It was reported that Stockton Council would provide a response in its own right but maintained and Academy Trust are also encouraged to respond to this consultation. The closing date for the consultation was 9<sup>th</sup> September 2022.

- SEND Review: Right Support, Right Place, Right Time. The SEND Review is a Department for Education Green Paper and consultation on the SEND and alternative provision (AP) system in England, presented to Parliament by the Secretary of State for Education Nadhim Zahawi on 29 March 2022.

It was reported that the Government are proposing to establish a single national SEND and alternative provision system that sets clear standards for the provision that children and young people should expect to receive, and the processes that should be in place to access it.

The Green Paper identifies three key challenges facing the SEND system.

- Challenge 1: outcomes for children and young people with SEN or in alternative provision are poor.
- Challenge 2: navigating the SEND system and AP is not a positive experience for children, young people and their families.

- Challenge 3: despite unprecedented investment, the system is not delivering value for money for children, young people and families.

Mr A Bryson reported that the Government have identified that there was a need to deliver greater national consistency in the support that should be made available, how it should be accessed and how it should be funded. A system where decision-making is based on the needs of children and young people, not on location. This must be underpinned by strong co-production and accountability at every level, and improved data collection to give a timely picture of how the system is performing so that issues can be addressed promptly. Attention was drawn to the green paper, which sets out the plan for how this will deliver a more inclusive SEND system.

The core proposals of the paper include the following.

- Chapter 2: A single national SEND and AP system
- Chapter 3: Excellent provision from early years to adulthood
- Chapter 4: A reformed and integrated role for AP
- Chapter 5: System roles, accountabilities and funding reform
- Chapter 6: Delivering change for children and families

It was reported that there were 22 questions associated with the consultation, where were provided within appendix B to the report. It had been noted that the consultation runs until 22<sup>nd</sup> July 2022.

RESOLVED that the report be received and noted.

8. ANY OTHER BUSINESS

There were no further items of business.

9. DATE AND TIME OF NEXT MEETING

RESOLVED that a calendar of meeting dates would be circulated once finalised.