

Leeds Schools Forum

Microsoft Teams Meeting
 Thursday 23rd June 2022 at 16:30

Membership (Apologies in Italics)	
GOVERNORS	HEADTEACHERS
Primary (6 seats)	Primary (6 seats)
<i>Sue Tuck</i> <i>Ireland Wood</i>	John Hutchinson St Theresa's Catholic Primary
<i>David Kagai</i> <i>St Nicholas</i>	<i>Helen Stott</i> <i>Allerton C of E Primary</i>
<i>John Garvani</i> <i>Broadgate</i>	Peter Harris Farsley Farfield Primary
<i>Jatinder Ubhi</i> <i>Swarcliffe Primary</i>	Julie Harkness Carr Manor Community School
<i>Andrew Neal</i> <i>Adel St John's Primary</i>	<i>Emma Wraight</i> <i>Fieldhead Carr</i>
	<i>Primary</i>
	Jo Smithson Greenhill Primary
Secondary (2 seats)	Secondary (2 seats)
<i>Barbara Trayer</i> <i>Allerton Grange</i>	Delia Martin Benton Park
<i>David Webster</i> <i>Pudsey Grammar</i>	
Special (1 seat)	Special (1 seat)
Russell Trigg East SILC, John Jamieson	Diane Reynard East SILC
Non School	Academies – Mainstream (10 seats)
<i>Angela Hynes</i> <i>PVI Providers</i>	David Gurney Cockburn School
<i>Helen Gration</i> <i>PVI Providers</i>	Neil Miley Dixons Academy
<i>Patrick Murphy</i> <i>Schools JCC</i>	John Thorne St Mary's Academy Menston
<i>Louise Turner</i> <i>16-19 Providers</i>	<i>Joe Barton</i> <i>Woodkirk Academy</i>
<i>Dan Cohen</i> <i>Jewish Faith Schools</i>	Rob Dixon Cockburn School
<i>Peter McQuillen-Strong</i> <i>Catholic Diocese</i>	Gavin Hosford Green Meadow
	<i>Rachel Colbourn</i> <i>Bramhope Primary</i>
	<i>Sarah Talbot</i> <i>East Ardsley</i>
	<i>Maria Williams</i> <i>Brigshaw</i>
	<i>High</i>
	<i>Kate Burton</i> <i>Alder Tree Primary</i>
Officers	
Tim Pouncey, Chief Officer Strategy & Resources	Academy – Special School (1 seat)
Louise Hornsey, Head of Service, Finance	Mary Ruggles Springwell Leeds North
<i>Shaheen Myers, Deputy Director Learning</i>	
Lucie McAulay, Head of Service, Finance	
Val Waite, Head of Learning Inclusion	Academy – Alternative Provision (1 seat)
<i>Shirley Maidens, Finance</i>	Vacancy
Elizabeth Jackson	
<i>Rebecca McCormack, Lead for Admissions & Family Information</i>	Jonathan Renton
<i>Michael Cole</i>	Louise Hornsey, Head of Finance
<i>Richard des Forges</i>	<i>Barbara Dostalov</i>
Claire Swift	<i>Lawrence Clark</i>
Liz Honeyman	

	<p>Peter Harris asked what role Schools Forum will play in the papers that are due. Tim advised that the Local Authority follow the Decision-Making process and Schools Forum is a good forum for consultation.</p> <p>Louise advised that the financial information for the Supplementary Funding report is ready for Children and Families to consider and make their recommendations. Peter Harris proposed a 1 item meeting before the end of term to discuss this. This was agreed.</p> <p>6.10 Lucie cover</p> <p>7.2 PH shared votes</p> <p>9.2 – Preference was to stay virtual.</p>	
<p>5.0</p> <p>5.1</p> <p>5.2</p> <p>5.3</p> <p>5.4</p> <p>5.5</p> <p>5.6</p>	<p>School and Extended Balances Outturn 2021-22</p> <ul style="list-style-type: none"> • Overall net surplus of £43.3m for maintained schools and extended schools. This is an increase of £4.6m compared to 2020/21. Schools’ balances have increased by £3.6m from a surplus of £33.5m at the end of 2020/21 to £37m at the end of 2021/22. • Although overall surplus of £37m, some schools are operating with deficit balances. The number of schools with deficit at end of 2021/22 was 21. • 12 schools have balances greater than 15% over three successive financial years. They are all primary schools and will be asked to complete an application if they wish to retain excess surplus balance. • The process for reviewing excess surplus balances (above 15% of funding) for Area Inclusion Partnerships (AIPs) is underway currently and meetings will be held with AIPs to discuss their end of year positions. Four AIPs are in a clawback position for 2021/22 and the evaluation of bids to retain the surplus is being carried out by the council <p>Jo raised question regarding surplus balances reducing to 8%. It was advised that this applies from this year going forward.</p> <p>Peter Harris – list of primary schools shows more than half of schools have balances over 8% so clear messages should be getting out there. This should be built into budget model and reiterated at autumn review. Schools expected to advise governors.</p> <p>John Hutchinson advised that he has discussed at meetings with Claire Swift regarding significant issues with recruitment. Fiscally aware of long-term budget projection.</p> <p>Patrick important this should be spent for children in school now. When we lobby or campaign for extra funding – no more effective argument if we are carrying surplus funding. We need to press for it to be used on the children.</p> <p>Individual school balances</p> <p>Balances for individual schools were circulated. This show balances at the end of 2021/22 in comparison to 2020/21. Schools are listed by phase with the highest percentage deficits first. Table gives analysis of school surplus and deficit balances.</p> <p>Details of Table 2 - Year end surplus and deficit balances for maintained schools within this report were given. It is noted that there is a reduction of 3 schools due to academy conversions, whose net balances were £447k surplus at the end of 2020/21.</p>	

5.7	<p>In relation to surplus balances, in accordance with the rules set out in Leeds Scheme for Financing Schools there are 41 schools where the surplus balances are above 15% of the school budget share at the end 2021/22. A reduction of 12 from the end of 2020/21.</p> <p>12 primary schools where balances remained greater than 15% over three successive years. They will be asked to complete an application if they wish to retain balance. Application will be considered by the Schools Forum Panel before the final decision is made by Children & Families Directorate.</p> <p>Remaining 29 schools that have balances over 15% threshold not subject to clawback as the balance has not been over 15% for 3 consecutive years. Due to high number in this category, they haven't been asked to identify how surplus will be utilised.</p> <p>In terms of deficit balances:</p> <p>Although overall surplus of £37m for schools, there are several schools with deficits. The number has increased by 9 since the end of 2020/21, with a total of 21 schools (11.9%) carrying forward a deficit from 2021/22. Value of deficit balances has reduced by £0.9m during 2021/22, closing balances value of £2.96m.</p> <p>Of the 21 schools in deficit:</p> <ul style="list-style-type: none"> • 4 are below £10k • 10 are between £10k and £100k • 7 are between £100k and £700k <p>Although the number of deficits has increased, the overall total value has reduced. Of the 21 schools in deficit at the end of 2021/22, 8 have already set an overall surplus budget for 2022/23. Another of the schools converted to academy status on 1st June 2022. Of the remaining 12, 10 already have a deficit action plan in place from previous years and the cumulative total deficit reduced by £190k in 2021/22.</p>	
5.8	<p>PH concerned about autumn teacher pay and effect on school budgets as no additional funding has been made available.</p>	
6.0	<p>DSG OUTTURN 2021-22</p> <p>6.1 This report informs of 2021/22 outturn position on the Dedicated Schools Grant (DSG). Overall there is an underspend of £2.383m. This is made up of small underspends in the school's block and central school services block and a higher underspend in both the early years and high needs blocks. These are detailed in the report.</p> <p>Went through by each block:</p> <p>Schools block</p> <p>6.2 The majority of the Schools Block is allocated to primary and secondary schools (ISB), with smaller amounts for de-delegated services and the growth fund. These budgets are subject to fluctuations in expenditure throughout the year. 2.2 explains when a school when becomes an academy, funding payments are made directly by the Education and Skills Funding Agency (ESFA). For Leeds City Council this means that there is a reduced expenditure, though overall there is an underspend as a result of recoupment adjustments on NNDR in respect of schools which have converted to academies during 2021/22. In addition, the ESFA have recently made us aware of an adjustment that will be processed on the value recouped from the</p>	

	<p>DSG to fund academies and free schools. This adjustment was due to be processed in 2021/22 but instead was delayed until 2022/23, so is no longer in the above totals. This amount has been added to the funding allocated to schools in 2022/23.</p> <p>Overall de-delegated services were underspent by £996k. The majority of this related to school's contingency and interventions, this amounts to £945k, free school meals amount to £65k and union duty £65k which is offset by an overspend of £133k on maternity pay and an overspend of £85k on employees suspended from schools. Small variances on de-delegated budgets come to a total of £17k.</p> <p>Additional income of £81k has been received due to the way de-delegated budgets are dealt with when a school becomes an academy.</p> <p>It is proposed that the underspend remains within DSG balances.</p> <p>Early years</p> <p>6.1 Overall, £1.394m underspend. As we reported previously a decision was made to increase the base hourly rate paid to providers for 3 and 4 year olds, this means £5.20 per hour is being utilised, even though funding received is £5.12 per hour. The base rate paid to providers for 3 and 4 year olds has increased to £4.78 per hour from £4.46 per hour in 2021/22. Spending within this block will be closely monitored due to risk that this approach may lead to an overspend.</p> <p>6.2 Tim advised that in February there had been talks regarding the base rate going from 4.46 – 4.70 passing on the 17p per hour increase plus 7p deprivation funding. Unclear what communication has been issued in terms of this, this will be checked and if necessary further details issued.</p> <p>High Needs</p> <p>6.3 As detailed in the table there was an underspend of £818k on the High Needs Block, though this is after the assumption that £1.181m is required from reserves to fund the in-year expenditure.</p> <p>4.4 details that demand for ECHP's levels have returned to pre pandemic levels and demand continues to rise.</p> <p>4.7 The Out of Area and Residential Placements budget was overspent by £1,458k, due to an insufficiency in places to meet specific needs in specific age groups alongside complexity of need that require bespoke provision often with residential accommodation alongside parental preferences and tribunal orders.</p> <p>4.8 SEN top-ups to institutions underspent by £1,670k.</p> <p>4.9 SEN budget for additional £6k blocks was overspent by £676k</p> <p>4.10 Noting hospital service spent £101k more than originally budgeted for</p> <p>6.4 4.11 Combined underspend in the services provided by Children and Families was £558k. Combination of vacant posts partly offset by an increase cost of SEN adaptations in schools.</p> <p>6.5 A question was raised about whether the £6k blocks is a national or local arrangements. Louise advised this will be checked and the details reported back to a future Schools Forum meeting.</p>	<p>RM</p> <p>LH</p>
<p>7.0 7.1</p>	<p>DSG Management Plan</p>	

	Any local authority with an overall deficit is required to present a plan to the DfE in relation to managing their future DSG budget. Overall, there is now a slight surplus, however pressures are expected in future years and therefore the council will still prepare a plan.	
8.0	Schools Bill School's bill making its way through parliament. This report highlights key provisions within the School's Bill that may be of significance to School's Forum:	
8.1	Academy Trusts Bill reflects Government aim that by 2030 all schools will be part of a Multi Academy Trust (MAT) or be in the process of joining one.	
8.2	National Funding Formula Intention to move to 'hard' formula. No date yet but some requirements for Local Authorities to move closer. Question raised if de-delegation could continue? Answer is yes de-delegation could continue. 2.4 The new measure does allow for local authorities to continue to allocate some aspects of schools' funding where the government judges that is necessary because local authorities have the most detailed knowledge about the needs of their local schools; for example, where the local authority has a Private Finance Initiative (PFI) contract for that school, or where the local authority asks a school to provide additional school places to meet its sufficiency duty. John Thorne raised the question of would the cap be removed on high needs funding? Louise Hornsey advised that this has been raised and the council would continue to lobby regarding this.	
9.0	Any other Business There was no other business on this occasion.	
10.0	Meeting Dates for 2022/23 and Forward Plan The next meeting is Thursday 6 th October.	