

Leeds Schools Forum

Microsoft Teams Meeting
 Thursday 18 November 2021 at 16:30

Membership (Apologies in Italics)	
GOVERNORS	HEADTEACHERS
Primary (6 seats)	Primary (6 seats)
Sue Tuck <i>David Kagai</i> <i>John Garvani</i> Jatinder Ubhi <i>Andrew Neal</i>	Ireland Wood <i>St Nicholas</i> <i>Broadgate</i> Swarcliffe Primary <i>Adel St John's Primary</i>
	<i>John Hutchinson</i> <i>Helen Stott</i> Peter Harris <i>Julie Harkness</i> <i>Emma Wraight</i>
	<i>St Theresa's Catholic Primary</i> <i>Allerton C of E Primary</i> Farsley Farfield Primary <i>Carr Manor Community School</i> <i>Fieldhead Carr Primary</i>
Secondary (2 seats)	Secondary (2 seats)
<i>Barbara Trayer</i> David Webster	<i>Allerton Grange</i> Pudsey Grammar
	<i>Delia Martin</i> <i>Lucie Lakin</i>
	<i>Benton Park</i> <i>Wetherby High</i>
Special (1 seat)	Special (1 seat)
Russell Trigg	East SILC, John Jamieson
	Diane Reynard
	East SILC
Non School	Academies – Mainstream (10 seats)
Angela Hynes Helen Gration Patrick Murphy <i>Louise Turner</i> Dan Cohen	PVI Providers PVI Providers Schools JCC <i>16-19 Providers</i> Jewish Faith Schools
	David Gurney <i>Neil Miley</i> John Thorne Joe Barton <i>Anna McKenzie</i> Rob Dixon <i>Helen Richardson</i>
	Cockburn School <i>Dixons Academy</i> St Mary's Academy Menston Woodkirk Academy <i>Richmond Hill</i> Cockburn School <i>Kippax Ash Tree</i>
Officers:	
<i>Sal Tariq, OBE, Director</i>	Academy – Special School (1 seat)
Tim Pouncey, Chief Officer Strategy & Resources	Mary Ruggles
Louise Hornsey, Head of Service, Finance	Springwell Leeds North
Shaheen Myers, Deputy Director Learning	
Lucie McAulay, Head of Service, Finance	Academy – Alternative Provision (1 Seat)
<i>Val Waite, Head of Learning Inclusion</i>	Vacancy
Shirley Maidens, Finance	
Rebecca McCormack, Lead for Admissions & Family Information	
Elizabeth Jackson	
Richard des Forges	

Item	Title	Actions
1.0	Introductions and Apologies Apologies were received from: Delia Martin, Barbara Trayer	
2.0 2.1	Schools Forum Membership Adverts for the following vacancies have gone out with a closing date of Friday 26 November. The majority of the vacancies are due to existing members term of office ending. A number of members have expressed an interest in re-applying. <ul style="list-style-type: none"> • Primary Heads x two vacancies • Secondary Heads x two vacancies • Academies x four vacancies • Primary Governor x one vacancy • Catholic Diocese x one vacancy 	
3.0 3.1	Minutes of Previous Meeting The minutes of the previous meeting were agreed	
4.0 4.1 4.2 4.3 4.4	Matters Arising <i>Page One, item four - schools balances.:</i> This refers to page six, item 5.9 Claw back of 15%+ school budgets. <i>Page Five, item 6.5 – Cap on gains:</i> Conversations are being held with the DfE constantly and the challenge is ongoing. <i>Page Six, item 7.8 – De-delegation of services:</i> heading to be changed to Funding Formula. This item will be brought to the January meeting. <i>Page Six, item eight – SIMS Update:</i> Progress is being made on this. Capita have been taken over by ESS who are changing the way they contract SIMS from next year. ESS has been asked for more information around costs so that it can be sent out to schools. Conversations will be held with other providers to see if they can offer a similar framework agreement. Work is also taking place to look at proposing that SIMS are removed from de-delegation. Consultation on the proposal will be sent out as soon as possible.	
5.0 5.1 5.2 5.3	DSG Management Plan As discussed at previous Schools Forums local authorities are required to produce a DSG management plan where they are projected to be in deficit. At the end of this year the DSG budget has a projected deficit of £5m and by 2025-2026 it is likely to be in excess of £20m. The cap on gains which was first introduced in 2018-2019 has resulted in a loss of £30.4m, £20.9m of which comes from the High Needs Bock. Leeds will be capped next year which will exacerbate the deficit. The main issues of the report can be found in section three of the plan. The template asks authorities how they will manage DSG pressures, what has been done and what is being planned. There is a focus on preventative work, reducing costs and improving outcomes. Benchmarking has taken place with other local authorities. Leeds has lower EHCPs than other authorities which is due to a funding for inclusion (FFI) system being in place. The authority also has lower costs per head of population	

5.4	<p>Work is taking place to explore joint with CCGs, linking in with Health around SEND work and invest to save opportunities. Areas of good practice are being reviewed to ensure consistency in terms of funding arrangements and how to fund unfilled places. Previous discussions have taken place around Early Years funding and how it is used to support pressures in the best way. Capacity and resource is also a priority; there may be a need to invest in resource to work on the management plan. Support from the Forum and other key stakeholders is required.</p>	
5.5	<p>Another key area is around outcomes for children and young people with SEND. Principles taken forward around referring to the 3As Strategy and the SEND Inclusion Strategy, both of which will underpin the principles moving forward. There will be some challenges. There are statutory obligations to be met whilst at the same time the need in the city is growing and the cap on funding is still in place.</p>	
5.6	<p><i>School improvement and brokerage grant:</i> the DfE is consulting on this at present and members of the Forum are encouraged to respond to it. The DfE propose to withdraw the grant from the local authority which will affect services in the authority and the ability to move some of its proposals forward. However, it does not directly affect the DSG.</p>	
5.7	<p><i>Local Authority Cap:</i> benchmarking has taken place, but it is not known how much other authorities are affected. Local authorities can be capped one year and not another and the cap can go up as well a down. Action: provide the Forum with details of which authorities have been capped and by how much.</p>	SM
5.8	<p>It was noted that there is a stark contrast between base funding in primary and secondary schools and the reverse on top up funding. The question was asked if there was a correlation between that and the lower number of EHCPs. The latest number of EHCPs in the city is around 5,030 which is probably less in proportion than other local authorities. However, over the last few months there has been an increase of 40 per month. Leeds position stands out starkly against the rest of Yorkshire and Humber and nationally. Indications are that the number of EHCPs is low in Leeds due to the reliance on the FFI system. Action: investigate the numbers more and provide context in terms of the numbers of EHCPs.</p>	VW
5.9	<p>The closest statistical neighbours to Leeds are Sheffield, Darlington, Calderdale, Stockton on Tees and Bury. The outlier is Bury with an average per pupil cost funding of £943 compared to Leeds at £663 per pupil. In 2022-2023 Sheffield will have a £3.9m cap and Kirklees £8.3m. Leeds has done a good job in reducing deprivation which is why the cap is reducing</p>	
5.10	<p>In terms of annual reviews for EHCPs a record is kept of missed appointments and the capacity is there to ensure that targets are being met. Failure to meet targets will result in failure to meet the needs of children and have an impact on funding. It was suggested that a workstream be created in the Plan.</p>	
5.11	<p>In terms of preventative measures a number of invest to save opportunities are being explored to create innovation for early preventative support. It was confirmed that two new provisions will be made available soon as well as Rose Court and a free school presumption on the Copperfields site. Robust conversations are taking place with a number of schools that are thinking of expanding because of basic need and a couple of schools are looking to increase provision on site eg Horsforth St Margaret's.</p>	

5.12	It is worth acknowledging that the DfE recently announced it was making available £2.6bn of capital funds for SEND provision. If previous methodology is used Leeds may well get about £39m. However, this has in no way been confirmed.	
5.13	<i>Special School Minimum Funding Guarantee (MFG):</i> The High Needs Operational Guide states that special schools get 0% MFG for 2022-2023. There is a funding review in the pipeline.	
6.0	School Funding Proposal 2022-2023	
6.1	Consultation on school funding for 2022-2023 went out to 267 maintained schools and academies. There were 60 responses compared to 63 in the previous year.	
6.2	<u>Transfer from the Schools Block to the High Needs Block</u>	
6.2.1	<i>A 0.5% transfer between from the schools block to the high needs block in 2022/23 estimated to be £3.069m.</i> 58 (97%) of responses supported the proposal. Comments received expressed concerns with the ongoing cap and the need to transfer funds. The Forum voted 100% in favour of the transfer.	
6.3	<u>Schools Funding Formula</u>	
6.3.1	Two options for funding formula for 2022/23, taking into account the proposed transfer out of the schools block of approx. £3.069m. <ul style="list-style-type: none"> • <i>Option 1: A cap on gains of 2.58%. All other factors are in line with the national funding formula, including the minimum funding guarantee of 2.0%.</i> • <i>Option 2: A reduced minimum funding guarantee of 1% and an increased cap on gains of 2.67%. All other factors are in line with the national funding formula.</i> 	
6.3.2	For both options there will be an increase in per pupil funding for all schools. Option one remains the closest to the national funding formula and is significantly better for 5% of schools. Option two is marginally better for 55% and for 105 schools there is no difference. Comments received varied but the majority were in support of option one as it is in line with the national funding formula.	
6.3.3	The growth fund allocation is not available at present and will be finalised in December when the figures are received from the ESFA. It was noted that there is a possibility that the allocation will not meet demand and as a result will have a knock-on effect. The final settlement will be brought back to the January meeting where the Forum will have an opportunity to review it.	
6.4	<u>Contribution towards severance costs for maintained schools</u>	
6.4.1	<i>A contribution in 2022/23 by maintained schools to be applied as a per pupil amount of £2.50 estimated to be a total of £150k.</i> The contribution goes towards premature retirement and redundancy costs. Of the 42 responses received 35 (83%) were in favour of the proposal. The Forum voted in favour of the transfer – four votes were received.	
7.0	Schools Surplus Balance Proposals	
7.1	The proposals consulted on with schools were to reduce the excess surplus balance threshold and to retain excess surplus balance following directed academy conversions.	

7.2	<u>Proposal to reduce excess surplus balance threshold</u>	
7.2.1	The proposal consulted on with maintained schools was to reduce the excess surplus balance threshold from 15% to 8% from the end of 2022-2023. Following benchmarking with other local authorities 15% is high in comparison. Most authorities have a threshold of 5-8%. It was noted that the current mechanism enabling schools to apply to retain the excess would remain in place. Responses from the consultation showed 45 (69%) in support of the amendment. For maintained schools only.	
7.2.2	Due to the pandemic there were no clawbacks last year and this would be taken into account if/when clawbacks were considered.	
7.2.3	A discussion was held around the effect the change would have in driving maintained schools to seek academy status. It was felt however that this was the right time to reduce the surplus; children are behind and struggling and the money should be spent on improving outcomes. 100% of those eligible to vote voted in favour of the proposal.	
7.3	<u>Proposal to retain excess surplus balance following directed academy conversions</u>	
7.3.1	Schools were asked to vote and an amendment to the Leeds Scheme for Financing Schools with the following paragraph written into the scheme: <i>“Where a school is directed to convert to academy status under section 4 (1)(b) of the Academies Act 2010 the school may retain a proportion of the surplus (excluding specific grants) up to 8% of school budget share; any surplus amount over this percentage will revert to the LA.”</i>	
7.3.2	It was brought to the attention of the Forum that ESFA guidance, March 2018 “Treatment of surplus and deficit balances when maintained schools become academies” (point five, page six) clearly states that the surplus should be transferred to the academy trust. As a result this will be looked into further and brought back to the January Forum.	
8.0	Any Other Business None.	
9.0	Meeting Dates for 2021-22 and Forward Plan Tuesday 18 January 2022 Thursday 17 February 2022	