

## Leeds Schools Forum meeting

Microsoft Teams Meeting  
 Thursday 3rd October 2024 at 16:30

<b>Membership</b> (Apologies in Italics)	
<b>GOVERNORS</b>	<b>HEADTEACHERS</b>
<b>Primary (6 seats)</b>	<b>Primary (6 seats)</b>
David Kagai <span style="float: right;">St</span> Nicholas <i>John Garvani</i> <i>Broadgate</i> <i>Victoria McWalker</i> <span style="float: right;"><i>St Margaret's</i></span> <i>Horsforth Stratis Koutsoukos</i> <i>St Nicholas</i> <i>Bradley Taylor</i> <span style="float: right;"><i>Kirkstall</i></span> Valley Vacant	Peter Harris (Chair) <span style="float: right;">Farsley Farfield</span> <i>Julie Harkness</i> <span style="float: right;"><i>Carr Manor Community School</i></span> Julian Gorton <span style="float: right;">Shakespeare Primary</span> Rebecca White <span style="float: right;">Sharp Lane</span> Kate Cameron <span style="float: right;">Calverley C/E</span> <i>Jane Astrid Devane</i> <span style="float: right;"><i>Shire Oak C/E</i></span>
<b>Secondary (1 seat)</b>	<b>Secondary (2 seats)</b>
<i>David Webster</i> <span style="float: right;"><i>Pudsey Grammar</i></span>	Samantha Jefferson <span style="float: right;">Wetherby High</span> Mark McKelvie <span style="float: right;">Pudsey Grammar</span>
<b>Special (1 seat)</b>	<b>Special (1 seat)</b>
<i>Russell Trigg</i> <span style="float: right;"><i>East SILC, John Jamieson</i></span>	Louise Quinn East SILC
<b>Non School</b>	<b>Academies – Mainstream (11 seats)</b>
<i>Christina Smith</i> <span style="float: right;"><i>PVI Providers</i></span> Vacancy Nick Tones <span style="float: right;">Schools JCC</span> Christopher Thornton <span style="float: right;">16-19</span> Providers <i>Dan Cohen</i> <span style="float: right;"><i>Jewish Faith Schools</i></span> <i>Peter McQuillen-Strong</i> <span style="float: right;"><i>Catholic Diocese</i></span>	<i>David Gurney</i> <span style="float: right;"><i>Cockburn School</i></span> Kyle Walker in place of <i>Katherine Somers</i> <span style="float: right;">Dixons</span> John Thorne <span style="float: right;">St Mary's Academy Menston</span> Joe Barton <span style="float: right;">Woodkirk Academy</span> <i>Rob Dixon</i> <span style="float: right;"><i>Cockburn School</i></span> Jason Patterson <span style="float: right;">Dixons Trinity Chapeltown</span> Sarah Talbot <span style="float: right;">East Ardsley</span> Kate Burton <span style="float: right;">Alder Tree Primary</span> Simon Princep <span style="float: right;">Abbey Grange CofE</span> Ailsa Hoyland <span style="float: right;">Bruntcliffe Academy</span> Vacant
<b>Officers</b>	
Phil Evans, Chief Officer resources Transformation and Partnerships	<b>Academy – Special School (1 seat)</b>
<i>Louise Hornsey, Head of Service, Finance</i>	Vacant
<i>Chris Sutton, Admissions and Family Information Lead</i>	
Lucie McAulay, Head of Service, Finance	<b>Academy – Alternative Provision (1 seat)</b>
Shirley Maidens, Finance	Vacancy
<i>Dan Barton Deputy Director, Learning</i>	<b>Academy – Special Provision (1 seat)</b>
	Mary Ruggles

	Title	Actions
<b>1</b>	<b>Welcome and Apologies</b>	
	Chair welcomed all and acknowledged apologies	
<b>2</b>	<b>Schools Forum Membership</b>	
<b>2.1</b>	Vacancies remain for: 1X Primary Governor 2 x Academy Mainstream 1 X Academy Alternative 1X Academy Special 1X Non School	
<b>3</b>	<b>Minutes of Previous meeting</b>	
<b>3.1</b>	Agreed as accurate.	
<b>4</b>	<b>Matters Arising</b>	
<b>4.1</b>	During the meeting, Peter initiated a review of the minutes from the last meeting and addressed matters arising. Key points included:	
<b>4.2</b>	<ul style="list-style-type: none"> <li>• A review of the minutes from the last meeting, focusing on specific items such as insurance changes, refunds of DEDELEGATED reserves, and the excess surplus balance.</li> <li>• An update on the refunds of the DEDELEGATED reserves was provided, indicating that refunds had been processed and should reflect in the schools' accounts.</li> <li>• A brief overview of the financial balances for schools, showing a comparison of current balances with those from previous years.</li> <li>• The process for dealing with excess surplus balances was discussed, including the involvement of a panel and the outcome of their review.</li> <li>• There was a call for nominations for the chair position, with Peter expressing willingness to continue if no one else volunteered.</li> </ul>	
<b>4.3</b>	<b>ACTION</b> Peter will remain as Chair.	<b>Peter</b>
<b>5</b>	<b>DSG Monitoring Report 24/25 Month 5</b>	
<b>5.1</b>	Lucie presented the DSG monitoring report, highlighting a projected in-year overspend of £15.142 million, which is about 2.7% of the total DSG funding. The report detailed the financial status across different blocks:	
<b>5.2</b>	<ul style="list-style-type: none"> <li>• <b>Schools Block:</b> A small surplus of 6K and an underspend of £273,000 in dedelegated budgets due to savings in the contingency fund and technical adjustments from academy conversions.</li> <li>• <b>Early Years Block:</b> A projected small surplus of £113,000 due to a final funding adjustment, with optimism that most of the early years budget will align with projections despite the introduction of additional funding for two-year-olds.</li> <li>• <b>High Needs Block:</b> A significant overspend of £15.273 million, even after a £3.5 million transfer from the school's block. Major pressures include £6.8 million overspend on out-of-area and residential placements, £2.9 million overspend</li> </ul>	

<p>5.3</p>	<p>on SEN top-ups to mainstream institutions, and a £359,000 combined overspend in services provided by children's and families. Additionally, a £3.4 million savings target included in the budget has not been met.</p> <p>Following the presentation of the DSG Monitoring Report for 24/25, specifically regarding the high needs block, several key points and questions were raised:</p> <ul style="list-style-type: none"> <li>• <b>Concerns and Clarifications:</b> A member inquired about the reasons behind the significant overspend in out-of-area placements, questioning if it was due to a lack of sufficient places in Leeds compared to other authorities. Gary Saul responded, highlighting a shortage of about 600 special school places in Leeds and the financial pressures from out-of-area placements. He also mentioned that Leeds has a significant number of special school places taken up by pupils from surrounding authorities.</li> <li>• <b>Benchmarking and Financial Implications:</b> Member asked about benchmarking against other core cities and the implications of the deficit on the city's financial management. Shirley Maidens clarified that the high needs block deficit sits outside of the Council's finances, and there is no direct correlation in the DSG among core cities. However, she mentioned that Leeds traditionally has been a low spending authority, which might contribute to receiving less funding now.</li> <li>• <b>Mitigation and Future Planning:</b> Phil Evans mentioned that a paper detailing the issues surrounding the deficit position and potential mitigation strategies would be presented at the next meeting. He also noted the statutory override that prevents the local authority from having to fund the DSG deficit until the end of the 25/26 financial year.</li> <li>• <b>Tribunals and Parental Preference:</b> Gary Saul discussed the role of parental preference in the placement of children in out-of-area schools, mentioning ongoing tribunals about section I placements. He explained the financial implications and the challenges in finding local provision for the most complex children.</li> </ul>	
<p>5.4</p>	<p><b>ACTION</b> Peter Harris suggested that a detailed report on the out-of-area and residential placements, including the number of children, their needs, and why they are not being met locally, should be brought to a future school's forum.</p>	<p>Gary</p>
<p>5.5</p>	<p>Lucie's presentation on Section 5 of the DSG Monitoring Report focused on the projected reserves and the requirement for a DSG deficit action plan. Here are the key points:</p> <ul style="list-style-type: none"> <li>• <b>Projected Reserves:</b> The report projects a general fund deficit reserve of £13.37 million, offset by a dedelegated underspend of £564,000, leading to a total DSG deficit of £12.813 million by the end of the year.</li> <li>• <b>DSG Deficit Action Plan:</b> Due to the projected deficit, there's a requirement to submit a DSG deficit action plan to the DfE. This plan should identify mitigations and consider the management of the future DSG deficit. It will be presented to a future schools forum meeting once completed.</li> </ul>	

5.5	<p>Additionally, Lucie mentioned the Core Schools Budget Grant, a government grant to cover the 5.5% teacher’s pay award from September to March, which will be passported out to schools once received. A member added that the grant covers everything above the assumed headroom in budgets, which is 1.6%, and noted that for some, the grant more than exceeds the additional cost of the pay award. A member also recalled that the assumed increase schools were advised to budget for was more than the government's assumption, suggesting schools would benefit from this grant.</p>	
6	<p><b>DSG Medium Term Financial Strategy 25/26</b></p>	
6.1	<p>Lucie's presentation on the DSG Medium Term Financial Strategy for 25/26 highlighted several critical points:</p>	
6.2	<ul style="list-style-type: none"> <li>• <b>Projected Deficits:</b> The strategy projects significant overspends within the DSG, escalating from £38.3 million to £105.1 million annually over the next three years, primarily within the high needs block. The cumulative deficit could reach £200 million by 27/28 if no mitigative actions are taken.</li> <li>• <b>Funding Assumptions:</b> The projections are based on an estimated DSG funding of £1.78 billion over three years, with the caveat that actual funding allocations for 25/26 have not yet been received from the DfE. The gains limit factor, which has historically reduced Leeds funding, is a significant concern, with its future status uncertain.</li> <li>• <b>High Needs Block Pressures:</b> The high needs block is expected to see overspends ranging from £38.2 million to £105 million, driven by increased demand and complexity in SEN provision. This includes substantial overspends on SEN top-ups and out-of-area placements.</li> <li>• <b>DSG Deficit Action Plan:</b> Due to the projected deficits, there's a requirement to submit a DSG deficit action plan to the DfE, aiming to identify mitigations and manage future deficits. This plan will be presented to a future schools forum meeting.</li> <li>• <b>Statutory Override and Risks:</b> The statutory override, which prevents the DSG deficit from impacting the council's general fund, is extended until the end of 25/26. However, the future of this override and its implications for Leeds finances remain a significant risk.</li> </ul>	
6.3	<p>The follow-up conversations and questions regarding the DSG Medium Term Financial Strategy for 25/26 focused on several key areas:</p> <ul style="list-style-type: none"> <li>• <b>Concerns about the Projected Deficit:</b> Participants expressed alarm at the projected cumulative deficit of £200 million by 27/28, highlighting the extraordinary scale of the issue and the urgency of addressing it.</li> <li>• <b>Discussion on the Gains Limit Factor:</b> There was a discussion about the impact of the gains limit factor on Leeds funding, with questions about how it has affected Leeds position relative to the national average over the years and whether there has been any progress in closing the gap.</li> </ul>	
6.4	<p><b>ACTION</b> Shirley and Lucie go back and look at the previous year’s figures</p>	<p><b>Shirley &amp; Lucie</b></p>
6.5	<ul style="list-style-type: none"> <li>• <b>Queries about Specific Budget Lines:</b> Questions were raised about specific budget lines in the strategy, such as the significant increase in the individual</li> </ul>	

6.6	<p>school's budget in 27/28 and the rationale behind it. It was clarified that there might have been a transposition error in the figures presented.</p> <p><b>ACTION</b> – Shirley will adjust the figures</p>	Shirley
6.7	<ul style="list-style-type: none"> <li>• <b>Invest to Save Budget:</b> There were queries about the purpose and impact of the Invest to Save budget, with a request for clarification on how it benefits schools. It was explained that the budget was initially allocated for a specific post related to coordinating early help, but the post is currently vacant, and future plans for the budget are under review.</li> <li>• <b>Government Intervention and Safety Valve:</b> The need for government intervention to address the funding crisis was highlighted, with references to the safety valve and delivering better value schemes as potential avenues for support. However, it was noted that Leeds might not yet be eligible for these schemes based on the current deficit projections.</li> <li>• Question was asked around table one schools block and why is there such a projection increase in the individual schools budget in 27/28</li> </ul>	
6.8	<p><b>ACTION</b> Lucie will check the figures around census and update the report</p>	Lucie
7	<b>Any Other Business</b>	
7.1	Lucie advised the Forum that the next meeting's date may need to be reconsidered as the school funding consultation paper, which includes decisions on fund transfers, is due. However, funding information won't be available until October 30th, potentially requiring revised timelines.	
8	<b>Forward Plan</b>	
9	The forward plan is part of the papers.	
10	<b>Meeting Dates for 2023-24 and Forward Plan</b>	
	The dates for upcoming Forums are part of the papers. All invites have been sent.	
	<b>Close</b>	