

 North Tyneside Council	North Tyneside Council SCHOOLS FORUM
	Wednesday 12 January 2022 - 12:30 – 14:30
	The meeting will be held virtually and will be live streamed at the following link: https://youtu.be/zCy9YrevUOo

AGENDA

1.	Apologies for Absence	Chair
2.	Attendance Register / Membership / Roles & Responsibilities	Chair
3.	Virtual Public Meeting / Observers (*)	Chair
4.	Declaration of Interest	Chair
5.	Minutes of the last meeting Pages 5-15	Chair
6.	Matters Arising: Verbal Update	
6.1	Council Financial Position – Update Presentation	CE
6.2	Schools Finance Policy & Practice update to include (as applicable): Circulated – Pages 17-25 a) National Funding Formula <ul style="list-style-type: none"> Local Funding Formula (Schools Block) High Needs Central Schools Services Block Early Years b) De-Delegation including Centrally Retained	CE
6.3	MASH Update Verbal Update	CP/JF
7.	Any Other Business	
8.	Date of Next Meeting – Wednesday, 23 March 2022	

North Tyneside Schools Forum Member Roles & Voting								
de-delegation Primary	de-delegation Secondary	scheme for financing schools	consultation on funding formula	General Duties	Retained Duties	all other matters	<i>last updated September 2019</i>	
1	2	3	4	5	6	7		
Voting							Phase	Role
School Members								
x		x	x	x	x	x	First	Head
x		x	x	x	x	x	Primary	Head
	x	x	x	x	x	x	High	Head
	x	x	x	x	x	x	Middle	Head
	x	x	x	x	x	x	Secondary	Head
Other School Members Non Locality Based								
x		x	x	x	x	x	Primary/ First	Governor
	x	x	x	x	x	x	Secondary/Middle	Governor
		x	x	x	x	x	Nursery	Head
		x	x	x	x	x	PRU	Head
		x	x	x	x	x	Special	Head
			x		x	x	Academy	Other
Non Schools Members Non Locality Based								
		x	x			x	16-19 Providers	Other
			x			x	EY PVI	Other
						x	C of E Diocese	Other
						x	RC Diocese	Other
						x	Trades Union	Other

Timetable & Forward Plan 2021/22

Date	Activity	Responsible
22 September	<u>Schools Forum Meeting</u> 1. To include appointment of Chair and Vice Chair 2. Review of the Constitution and supporting documents 3. Responsibilities for Redundancy & Early Retirement Costs – Annual Update	Schools Forum
7 October	School Census Day	DFE/ESFA
11 October	Application for submitting disapplication requests	Local Authority
24 November	<u>Schools Forum Meeting</u>	Schools Forum
19 November	Deadline for submitting disapplication requests	Local Authority
19 November	Deadline for submitting disapplication requests if wish to move more than 5% of the Schools block	Local Authority
3 November	School census database closed. Checks and validation commences	DFE/ESFA
12 January	<u>Schools Forum Meeting</u>	Schools Forum
	Submit final proposals re APT	Local Authority
21 January	Deadline for submissions of final 2022 to 2023 APT to ESFA	Local Authority
7 February	Cabinet Meeting for approval of 22/23 Schools Funding	Local Authority
21 February	Cabinet Meeting	Local Authority
28 February	Deadline for confirmation of Schools budget shares to mainstream maintained schools.	DFE/ESFA
March 22	<u>Schools Forum Meeting</u> 1. Capital Investment Plan (subject to DFE announcement) 2. Dedicated Schools Grant update 3. Scheme for Financing Schools – Annual Update (and review if required)	Schools Forum
April 22	Cabinet Meeting	Local Authority
13 July	<u>Schools Forum Meeting</u> 1. Service Manager Reports / Updates 2. Schools Finance Update 3. Responsibilities for Redundancy & Early Retirement Costs – Annual Update	Schools Forum

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North Tyneside Council

Minutes

Meeting Schools Forum **Date** Wednesday 24 November 2021

Location Via Microsoft Teams

Present

✓ Present
D Deputy
A Apologies
O Absent

Name	Organisation	Representing	22.09.21	24.11.21
Andrew James	St Aidan's Primary	Primary	✓	D - Rob Harker
Angi Gibson	Hadrian Park Primary	Primary	✓	✓
Candida Mellor	Trade Unions	Trade Unions	Suzette Thompson	✓
Collen Ward	Coquet Park First School	Primary	✓	✓
David Bavaird	Norham High School	Governor - Secondary	✓	✓
David Watson	St Thomas More	RC Schools	✓	✓
Finn Wilcock	Southridge First School	Primary	N/A	✓
Gavin Storey	Cullercoats Primary	Primary	✓	✓
Jill Wraith	Benton Dene Primary	Primary	✓	✓
Joanne Thompson	Holystone Out of School	Early Years PVI	O	✓
John Croft	Sir James Knott	Nursery	✓	✓
John Newport	Marden Bridge Middle School	Middle	✓	✓
Karen Croskery	North Tyneside Student Support Service	PRU	✓	✓
Kelly Holbrook	Longbenton High School	Secondary	✓	✓
Kerry Lillico	Grasmere Academy	Academy	A	✓
Laura Baggett	Monkhouse Primary	Primary	✓	✓
Marie Flatman	Tyne Met	16-19 Provider	A	✓
Louise Bradford	Diocese	C of E Diocese	Vacancy	✓
Matt Snape	Marden High School	Secondary	✓	✓
Michael Young	Spring Gardens Primary	Primary	✓	✓
Paul Mitchell	Whitley Bay High School	Governor – Secondary	✓	Vacancy
Paul Johnson	Churchill Community College	Secondary	✓	✓
Peter Gannon	Silverdale School	Special	✓	✓
Peter Thorp	Redesdale Primary	Governor - Primary	✓	✓
Philip Sanderson	Kings Priory	Academy	✓	✓
Stephen Baines	Holystone Primary	Primary	✓	✓
Stephen Easton	Marine Park First School	First	✓	A – stood down
Steve Wilson	Whitley Bay High School	High	A	✓
<u>In Attendance:</u>				
Mark Longstaff	Director of Commissioning & Asset Management	NTC	✓ * Part meeting	✓
Claire Emmerson	Senior Manager - Finance Strategy & Planning	NTC	✓	D - Janice Gillespie
Noel Kay	Senior Business Partner, Finance	NTC	N/A	✓

Diane Thompson	Finance	ENGIE	✓	✓
Susan Smiles	Finance	ENGIE	N/A	✓
Christina Ponting	Senior Manager - Schools HR	ENGIE/NTC	✓	✓
Mary Nergaard	PA to Director of Commissioning & Asset Management	NTC	✓	A
Fiona Lucas	Project Support Officer <i>minute taker</i>	NTC	N/A	✓
Diane Buckle	Assistant Director for Education	NTC	✓	O
Kevin Burns	Senior School Improvement Officer (Vulnerable Learners)	NTC	✓	✓
Mark Taylor	Strategic Commissioning Manager	NTC	✓	✓

Item		Action
1.	Apologies for Absence	
	See table above	
2.	Attendance Register / Membership	
	<p>CP provided an overview of the changes to the current membership as follows:</p> <ul style="list-style-type: none"> • Louise Bradford is the new representative for the CofE Diocese • Stephen Easton has stood down and will be replaced by Finn Wilcock • Inductions have been carried out • Carrying one vacancy for a Secondary Governor • Four terms have been renewed (Andrew James, Paul Johnson, Colleen Ward and Matt Snape) • Candy Mellor had returned as the Trade Unions representative • 7 terms due to end in the next 3 months. <p>ACTION: CP to liaise with these members on their future plans and fill any vacancies if applicable</p> <ul style="list-style-type: none"> • Stephen Baines raised the query that if there was a change in localities that this would affect the Schools Forum Membership. Gavin Storey confirmed that this would be maintained until September 2022 until the central belt comes in. CP agreed that a review / change to the constitution could be looked at if required. 	CP
3.	Public Meeting / Observers	
	The Chair welcomed the public to the meeting.	
4.	Declaration of Interest	
	There were no declarations of interest.	
5.	Minutes of the last meeting	
	<p>Minutes agreed as an accurate record of the meeting.</p> <p>A message was received that Tim Jones (TJ) is no longer the Headteacher at Langley First School. CP confirmed that TJ had stepped down from Schools Forum and that she would amend the minutes.</p> <p>Post-meeting note: MN confirmed that TJ has already been removed from the membership distribution list and from the notes template as of the date of this meeting. The reference in the minutes of the last meeting was linked to his attendance in July 2021, before he stepped down.</p>	

6.	Matters Arising	
	Page 8, Item 7 – Catering SLAs. <ul style="list-style-type: none"> Mark Longstaff confirmed that the response has been sent to the respective Headteacher. 	
6.1	Finance Update Janice Gillespie	
	<p>JG talked through the presentation on screen. Main points to note as follows:</p> <p>a) Financial Update 2021/22</p> <ul style="list-style-type: none"> School Finances <ul style="list-style-type: none"> Pressure of £3.902m after first monitoring £2.091m better than budgeted Improvement in Schools in Deficit of £0.909m Issues with identifying funding means some schools forecast at budget until resolved High Needs <ul style="list-style-type: none"> Forecast pressure of £12.641m Caused by increasing numbers of plans and placements Early Years <ul style="list-style-type: none"> In year forecast on target CSSB <ul style="list-style-type: none"> Impact dealt with within NTC overall budget forecast position Deficit Schools <ul style="list-style-type: none"> There are some significant movements in the right direction <p>Schools Forum is asked to:</p> <ul style="list-style-type: none"> Note the forecast positions on all DSG blocks; Thank schools for work done to reduce overall school block pressure to date Continue to support LA plans to recover High Needs position <p>Noted and agreed</p> <p>b) Dedicated Schools Grant Indicative Values 2022/23</p> <ul style="list-style-type: none"> Summary of the DSG Indicative values for 2022/23 was shown on screen (Table 1 of the report) Overview of the indicative school block funding was shown on screen. This is based on the October 2020 census information, using planned rates The key aspects of the formula for 2022/23 are: <ul style="list-style-type: none"> Minimum per pupil funding levels will be set at Primary £4,265, Key Stage 3 £5,321 and Key Stage 4 £5,831 Funding floor will be set at 2% per pupil Schools that are attracting their core NFF allocations will benefit from an average increase of 3% to the formula's core factors Growth funding will be based on the same methodology as in 2021/22 No authority will lose more than 0.5% of its 2021/22 Schools block allocation. Two important restrictions will continue: <ul style="list-style-type: none"> Local authorities will continue to set a Minimum Funding Guarantee in the LFF, which in 2022/23 must be between +0.5% and +2.00%. 	

- Local authorities can only transfer up to 0.5% of their Schools block to other blocks of the DSG, with their Schools Forum approval.
- **High Needs**
 - 43% increase in funding since 2017/18 (expected 54% for 2022/23)
 - Costs risen by 62% in same period
 - Internal recharging rates not changed for over 10 years; cost rise driven by volume increases
 - Table 3 of the report was shown on screen which outlines the indicative value of the High Needs block in 2021/22 based on static rolls
 - Chart 1 of the report illustrates costs vs funding
- **Central Schools Services Block**
 - 2021/22 decreased by £0.174m, met from de-delegation allocated for headroom
 - 2022/23 decrease by further £0.150m
 - Need to consider which areas to reduce funding
 - Also need to consider alternative funding arrangements where services are valued, for example High Borran will be 100% funded by per pupil charges
 - The relevant services will be reporting back to Forum in January 2022 to ratify these changes and to agree any services, including additional functions, to be funded by de-delegation
 - Decision required for January 2022.

Discussion followed around:

- Peter Gannon reported that the outcome of the CSSB sub-group, who were meeting on where the £174k would be cut from, could be provided at the January meeting.
- **ACTION: JG to pick this up outside of the meeting and a note to be circulated to Forum by 26th November 2021.**

JG

Schools Forum is asked to:

- Note the update on indicative allocations for each of the four DSG funding blocks;
Noted
- School Forum finance sub-group to work with LA colleagues on CSSB reduction issues
Forum agreed

c) Local Funding Formula 2022/23 Consultation Results

- The Authority asked schools to consider the impact of the following questions:
 1. Do schools agree to continue to use factors in line with NFF, funding permitting?
 2. Do schools agree to allow the Authority to set a minimum funding guarantee and capping based on affordability?
 3. Do schools support a 0.5% transfer from School's block to High Needs block?
- School Forum are asked to consider feedback and advise the LA. LA must take advice and provide evidence unless it intends to challenge decision via Department for Education

- Summary of the Information provided to schools on 0.5% Transfer was shown on screen
 - Based on indicative funding allocation, this model is affordable at +0.64% MFG (within the allowable range of +0.5% to +2%)
 - 19 Schools will have no impact due to MPPF.
 - MPPF triggered by:
 - Lump sum is a large % of funding
 - Low deprivation
 - NFF impact on phase ratios
 - Potential 0.5% transfer
 - Minimum per Pupil Funding (MPPF) Rates:
 - First/Primary (£4,265),
 - Middle-Deemed-Secondary (£4,793),
 - Secondary (£5,525),
 - High (£5,661),
 - All-through (£4,790)
 - High Needs increase 7.75%
 - Overview of what this looks like for impacted schools was shown on screen
 - Minimum deduction 0.3%, £2k
 - Maximum Deduction 0.93%, £72k
 - All schools will receive at least 0.51% increase assuming schools block transfer
 - Maximum increase after transfer 6.34% (impacted by removing capping applied in 2021/22)
 - Information provided on the proposed use of the 0.5% transfer was shown on screen
- Consultation Results:**
- 26 schools responded (37%) which is a reduction from 68% in 2019 and 54% in 2020
 - Responses were received from 20 Head Teachers, 11 Governors / Governing Bodies and 9 leadership figures
 - Engagement lower than expected
 - Majority schools agree to stay with NFF factors and rates (92%)
 - 77% of schools agree for the LA to set Minimum Funding Guarantee based on affordability
 - Schools recommend use of deprivation factors for any surplus allocation (will be subject to APT accessibility)
 - There was no overall agreement on the 0.5% transfer with the majority schools disagreeing with the LA's request to transfer funding to High Needs
 - 92% of schools cited two main reasons for their responses, based on either the lack of clarity in the plans for using the funding or the impact deducting this funding has on already tight school balances
 - Evidence or confidence in plans, need for more information or clarity and existing priorities on school money are strong messages.
 - Schools mentioned delaying decision until:
 - Plans deliver required clarity
 - OFSTED inspection is completed

	<ul style="list-style-type: none"> Any planned transfer would need to meet DfE/ESFA requirements before being ratified, especially if sought against advice of Schools Forum <p>Discussion followed around the 0.5% school block funding transfer:</p> <ul style="list-style-type: none"> (Steve Wilson) Forum needs to be careful on how any funds should be distributed and the 37% return rate is disappointing. (Michael Young) information was sent to Headteachers to be passed to Chairs of Governors and some Chairs of Governors do not think that this is a good method of communication. Some Chairs of Governors would like the information sent directly to them. Emails regarding the MFG insulating schools against the block transfer and the MFG hasn't been agreed yet. Transferring 0.5% to have a function which accelerates this process will just create more issues in schools with bodies of 10 hours. Schools are struggling with the amount of 10 hours they can provide. Investing in a project (similar to what Peter Gannon's school does to support schools with challenging pupils) would be more beneficial. What would happen to the block transfer for his school of £7.5k does that include the increased amount provided created by schools protected by the MFG if they wouldn't pay anything where would the additional funds come from? <u>ACTION:</u> JG to provide a response after the meeting. (Gavin Storey) the exact figure on how the high needs block would be increased was not provided. Queries on the SEN side, as classed as an all in one offer, but there wasn't an option of the schools' support team. (Peter Gannon) if Forum decided to look again at this and not make a decision today when is the last point that a decision needs to be made. JG confirmed that a report goes back to Cabinet at the end of January and therefore at the January 2022 meeting there needs to be an agreement. (Angi Gibson) do we have a breakdown of % of schools who returned the survey in each area? <u>ACTION:</u> JG confirmed that this information could be obtained and provided after the meeting. (David Watson) – the Authority have had plenty of time to explain their reasons for the transfer and the time for the consultation was before the plan was brought to Schools Forum. The DSG was to be shared with Members of Forum and this hasn't been done. The schools funding settlement will have to pay for any increase in salaries, there will be no separate pay grant, therefore taking any money from schools' block is a concern. Pressures of gas and electricity price increases is also a worry. The Government are recognising that by indicating the 7.4% increase in high needs they are not expecting the LA to make the 0.5% transfer this year (paper circulated yesterday). Forum should decide today and it would not be to agree to a transfer. (David Bavaird) disagreed with this suggestion and felt that more work should be provided before making a decision. If time allows, we should look at the aspects again and decide in January. A small task and finish group could be set up and report back to Schools Forum as this is a huge decision which affects so many schools. (Philip Sanderson) confirmed that he did do a return to the consultation but it says on the presentation that his school didn't send one. How can Forum have confidence that all schools received the online submission? There is 	<p>JG</p> <p>JG</p>
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	<p>a significant impact to all schools to any of these decisions made by Schools Forum.</p> <ul style="list-style-type: none"> Peter Gannon recommended that JG updates the slides to show a list of the schools that did respond as well as showing the pie chart. Therefore, schools would have confidence that their input has been included. <u>ACTION:</u> JG to amend the slides and circulate to the group after the meeting. (Michael Young) – Spring Gardens responded to the consultation, as part of the collaborative group, so if this is only recorded as one response this would affect the numbers. MY asked how can we assure schools they won't be impacted by the MFG as we haven't approved the MFG yet? <p><i>Janice Gillespie left the meeting</i></p> <ul style="list-style-type: none"> (Steve Wilson) queried where the decision about whether we go to deprivation or age rated pupil unit fitted within those votes. <u>ACTION:</u> PG to follow up with JG on his question outlined above. <p>Recommendations: Schools Forum is asked to consider the results of the consultation with schools, and vote on the following options:</p> <ul style="list-style-type: none"> Agree to continue to use factors in line with NFF, funding permitting Forum agreed – 16 votes for, 0 votes against Agree to allow the Authority to set a minimum funding guarantee and capping based on affordability Forum agreed – 17 votes for, 0 votes against Consider the response to the request to transfer 0.5% School block funding to High Needs and either: <ul style="list-style-type: none"> a) Support a 0.5% transfer from the Schools block to High Needs block to fund the projects outlined by SEND/SST services 0 votes for, 18 votes against b) Support delaying the decision until January 2022 and allow the LA to provide more information and come up with a better plan on the 0.5% transfer 2 votes for c) Not support any transfer of funds from Schools Block to High Needs Block 14 votes against 	<p>JG</p> <p>PG/JG</p>
6.2	Review of Schools Forum Membership	Christina Ponting
	<p>CP talked through the report. Main points to note as follows:</p> <ul style="list-style-type: none"> At the last Schools Forum it was noted that due to a status change of a number of Schools (from Voluntary Aided/Maintained School to Academy) in August 2021 and further changes being planned to take place in October 2021 and April 2022, Schools Forum needed to review its membership to determine if there was a need for any changes Schools Forum last reviewed its membership, in January 2018 At that time it was decided there was no need to add additional Academy representatives to Schools Forum as the number of pupils affected was a relatively small number 	

- Table 1 of the report notes the information that was presented to Schools Forum at that time, with a correction to the Academy number of Schools Forum representatives being noted as 2 and not 3 as referenced in Table 1 of the report
- Schools Forum will be aware that post holders are not in the role to represent their individual school or organisation, but to represent their sector or locality
- The change of the status of a number of Primary Schools to join the Bishop Berwick Catholic Education Academy Trust (BBCET) will result in a number of pupils (2,148) being accounted for in an Academy School
- This will result in 13 Academy Schools in North Tyneside by April 2022
- It is therefore proposed to increase its overall membership numbers from 27 to 29, allocating 2 additional representative roles to 'Other School Members – Non Locality Based'. Thereby, increasing the Academy representative roles from 2 to 4
- Table 2 of the report outlines the information on the pupil numbers on the same basis as data was presented / considered in 2018
- The proposed changes to the current membership of Schools Forum to accommodate 2 additional 'Other School Members – Non Locality Based' are noted/ highlighted in Appendix B of the report

Discussion followed around:

- (Paul Johnson) would it mean that some schools were doubly represented if academies hold additional seats in their locality. CP confirmed that individuals holding a locality seat would be representing their locality and not their individual school and it was up to the locality to decide who their representative was to be.
- (Michael Young) does it mean that the areas that previously represented the primaries, and are now part of academies, would lose seats. CP reported that no they would still have their seats as the recommendation to Schools Forum was for increasing their membership, not losing them.
- (Philip Sanderson) – could CP advise how current academy representatives are appointed and if a large number of the catholic schools haven't converted yet how can they be included. CP confirmed that only a small number of catholic schools are yet to convert.

Recommendations:

Schools Forum having read this report and clearly understanding the information provided consider this report and note the following:

- Members are asked to consider the proposal noted and to reach agreement on the recommendation of increasing the 'Other School Members – Not locality based' by 2 to accommodate the addition of new Academy representative roles onto Schools Forum.
- If Schools Forum members agree with the recommendation contained within this report, the updated membership would replace the current membership and new Academy members would be expected to join School Forum and attend from the next available meeting (12th January 2022).
- It is up to the Academy schools to come together and decide how they wish to appoint. New members will be offered support in their role with an Induction/Update session (in line with support offered to all Schools Forum

	<p>members) which ideally can take place before the next meeting in January 2022.</p> <ul style="list-style-type: none"> • The membership of Schools Forum will be kept under review; so that roles on Schools Forum remain representatives of the category/ type of School operating within the North Tyneside Council area and in accordance with the ESFA Good Practice Guidance for Schools Forums. • Forum agreed 	
6.3	<p>Schools Forum Constitution and Action Plan Review</p> <p>Christina Ponting</p>	
	<p>CP talked through the report on the review of the Constitution and the Self-Assessment. Main points to note as follows:</p> <ul style="list-style-type: none"> • The North Tyneside Schools Forum Constitution and Self-Assessment has been reviewed in line with updated ESFA advice and guidance as at 11th November 2021 • There are no material changes needed to either document. • Changes that are needed are noted via tracked changes in the documents appended to the reports for ease of reference for members. • Members were asked to consider if meetings were to continue virtually as the current recommendation they had in place on this comes to an end in December 2021. <p>Discussion followed around:</p> <ul style="list-style-type: none"> • (David Bavaird) can you have some people attending the meeting in person and some people joining virtually? PG reported that it is either or as currently the technology was not available to support both options. • CP confirmed that the Membership in the 2021 constitution reflects the decision made at today's meeting, but asked for Schools Forum to agree to update the membership to reflect the decision made in 6.2 to present the updated membership numbers. • CP reminded colleagues that they are a locality representative. CP has created a document which puts all of the schools and geographical area in one document to support members in their role and will arrange for this to be sent to members. <p>Recommendations:</p> <p>Schools Forum having read this report and clearly understanding the information provided consider this report and note the following:</p> <ul style="list-style-type: none"> • Do Members want to continue to have the meetings virtually or face to face meetings at Langdale. <p>Forum agreed to continue to meet virtually over the following year– 17 votes for.</p> <ul style="list-style-type: none"> • Members are asked to consider the changes to the document and to confirm if they are clear on the changes and if they are happy for the document to be updated a noted. • If Schools Forum members are in agreement the updated document would replace the current document provided to members and noted on the Schools Forum website. • The North Tyneside Schools Forum Constitution will be reviewed again in September 2022 or asap thereafter once ESFA guidance is updated/ provided. <p>Forum agreed</p>	

6.4	Special Leave SLA Christina Ponting	
	<ul style="list-style-type: none"> • Update circulated via email before the meeting. • Further updates will be provided at the January Forum meeting. • Forum noted the information provided by CP 	
6.5	Mash Update Christina Ponting	
	<ul style="list-style-type: none"> • CP outlined that in November 2018 an update was given on the MASH hub to confirm that a post could be established to support headteachers / a specific education post when Schools were having to refer to the front door or social care. • MASH is not a statutory role, but Schools Forum agreed to provide 50% of the funding for a dedicated Education post, taken from the DSG, to continue on a definite basis for all maintained schools. Other schools would be invoiced separately. • Forum asked at that time for an update on the role to be presented back to Forum in November 2021. As Julie Firth is unwell and unable to attend the Forum it was recommended that she provide information separately to Forum members (if possible) and attend the next Forum in January 2022 to provide an update at that meeting. • ACTION: Forum agreed for Julie Firth to attend the January meeting to provide the MASH update. 	CP/JF
7.	Any Other Business	
	<p>Self-assessment tool kit Christina Ponting</p> <ul style="list-style-type: none"> • CP reported that a self-assessment tool kit is prepared each year to support Forum to ensure that they are operating in line with ESFA good practice. • The self-assessment reflects that meetings can operate remotely and on support for governors and how they communicate. • Michael had raised the point earlier in the meeting on communicating with Governors. CP outlined that information is distributed to clerks of governors but there is not a central list to distribute to governors as not all schools use LA provided clerking services. • Chairs of Governors had previously asked to receive correspondence via their headteachers. • As part of the changes noted within the self-assessment, from January Head teachers are being asked to support wider Governor awareness by asking / offering for their finance lead and / or chair of governors to attend Schools Forum with them. <p>Discussion followed around the communication to Governors:</p> <ul style="list-style-type: none"> • (Peter Thorp) suggested to go back to Chairs of Governors on how they would like to be corresponded with. • (David Bavaird) suggested that an update is given at the regular training sessions for Governors at Langdale on the role of Schools Forum to support governor engagement. • (Michael Young) confirmed that he would be willing to be the Governor representative to attend the training on the role of Schools Forum and that Governors be asked to provide their email address so they can receive any communication. 	

	<ul style="list-style-type: none"> • (Peter Thorp) queried if all Chairs of Governors receive a copy of the Schools Forum minutes. CP confirmed that Governors do not receive them directly but they are distributed out and Governors are asked to be made aware of them. • <u>ACTION:</u> CP to go out to Governors again to ask if they would consent to giving their email address to Forum Members and to facilitating wider support for Governor engagement. 	CP
8.	Date of next meeting	
	Wednesday, 12 January 2022 at 12:30pm, via Teams.	

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Briefing note

To: Schools Forum **Author:** Claire Emmerson

Date: 12 January 2022

Purpose of the Paper:

Information	
Consultation	√
Decision	√

Title of Briefing: Update on 2022/23 DSG Values and Funding Distribution including Proposals re: High Needs and Early Years and request for approval of De-delegated and Centrally Retained items and the proposed growth policy.

Purpose of Paper

- 1.1 This paper provides an outline of the current information available relating to 2022/23 for each funding block of the Dedicated Schools Grant (DSG) following the initial allocations announced on 16 December 2021.
- 1.2 It also summarises High Needs and Early Years block funding for 2022/23.
- 1.3 The paper requests approval from Forum for de-delegated and centrally retained items.
- 1.4 The paper requests approval from Forum of the falling rolls and growth funding allocations proposed by the Authority.

Update on 2022/23 Funding Allocations after publication on 16 December 2021

- 2.1 On 16 December, the Department for Education (DfE) published the initial allocations for each block of the DSG. The DSG will continue to be comprised of four blocks: schools, high needs, early years and central school services. Each of the four blocks has its own funding formula.
- 2.2 The North Tyneside allocation for the DSG in 2022/23 using October census 2021 and follows the 2021/22 allocation as it includes funding previously allocated as grants for pay awards and pension increases is shown in table 1 below with prior year figures for comparison;

Table 1: Schools Block 2022/23 allocation compared with Prior Years

	2017/18 Baseline	2018/19	2019/20	2020/21	2021/22*	Actual for 2022/23**	2021/22 to 2022/23
	£m	£m	£m	£m	£m	£m	£m
Schools	115.395	116.594	120.926	126.794	137.231	139.273	2.042
Central School Services	2.500	2.314	2.343	2.051	1.877	1.724	(0.153)
High Needs	18.680	19.291	19.818	22.319	26.709	28.747	2.038
Early Years Block	12.064	12.553	12.514	12.771	13.946	13.971	0.025
TOTAL	148.639	150.752	155.601	163.935	179.763	183.715	3.952
Move from 17/18 Baseline £m	-	2.113	6.962	15.296	31.124	35.076	
Move from 17/18 Baseline %	-	1.42%	4.68%	10.29%	20.94%	23.6%	
Change per Year £m	-	2.113	4.849	8.334	15.828	3.952	
Change per Year %	-	1.42%	3.22%	5.36%	9.66%	2.2%	

* Includes pay award and pension grants previously separate to DSG, now rolled into funding formula

** Excludes approx. £1.100m Rates funding now removed from the funding formula

Schools Block

- 2.3 In 2022/23, as in each year since 2018/19, the local authority (LA) will receive its DSG funding based on the DfE national funding formula (NFF). Following consultation with Schools which took place during October and November 2021 the Authority are proposing to continue to mirror the local funding formulae (LFF) to the National Funding Formula factors in full, as done in 2021/22. The proposed Schools block rates are shown in Appendix A.
- 2.4 Forum will recall, as discussed at the 24 November 2021 meeting, that the DfE have restricted the range of a Minimum Funding Guarantee (MFG) between +0.5% and +2.0%. Calculations through the Authority Proforma Tool (APT), subject to final amendments, are showing MFG affordable at 2.00% with a Capping at 4.99%. There would, therefore, be no residual funding to allocate. Schools will all achieve increased rates where their pupil numbers have increased.
- 2.5 Forum should note that as the Authority Proforma Tool (APT) is finalised and will be submitted to the DfE for the 21 January 2022 deadline other values may still be subject to further minor changes.
- 2.6 For illustrative purposes Appendix B includes an overview of the changes in pupil numbers and funding by phase from 2021/22 to 2022/23.
- 2.7 As in previous years the Authority is proposing to deduct £0.250m from the Schools block to fund falling rolls. In addition, the Authority is proposing to deduct £0.250m to support growth funding. The total funding therefore available to distribute to schools using the local funding formula is £138.773m.
- 2.8 Growth funding assessments for 2022/23 will be carried out once the September 2022 admissions data is available.

High Needs Block

- 3.1 The £28.747m figure outlined above for the 2022/23 High Needs block reflects the increased Dedicated Schools Grant funding announced by the DfE and includes funding previously paid as separate grants for pay award and pension increases, as in 2021/22. The £2.038m year on year increase is therefore covering these costs going forward.
- 3.2 Following the Autumn 21 Spending Review, £325m additional High Needs funding has been allocated, of which North Tyneside's allocation is £1.073m. This allocation is on top of the DSG High Needs Block allocation calculated under the National Funding Formula but is subject to the same DSG conditions of grant. This extra funding recognises the additional cots that local authorities and schools will face in the coming year, which were not foreseen when the original High Needs Block allocations were calculated, including the Health and Social Care Levy. The additional funding also takes into account that colleges and other providers offering extra hours of study to students with high needs may require extra high needs top-up funding to support those students.
- 3.3 Forum will recall as previously reported at the 24 November 2021 meeting, the High Needs block outturn for 2020/21 was an overspend of £8.720m. Despite an increase in funding of £4.390m in 2021/22, the pressure within High Needs has continued to increase with a forecasted in-year pressure of £4.247m in 2021/22 and therefore an estimated total cumulative overspend of just over £12.967m.
- 3.4 The factors driving the pressures shown above were outlined in the report to Forum on 24 November. The latest position on these pressures is shown in table 2.

Table 2: Forecasted High Needs Overspend as at November 2021

Provision	Budget £m	Forecast £m	Variance £m	Comment
Special schools and PRU	15.519	17.959	2.440	Pressure on places for children with profound, Multiple Learning Difficulties, Social Emotional and Mental Health problems and Autism Spectrum Disorder
ARPs/Top ups	4.120	5.006	0.886	Pressures in pre 16 top ups mainstream and Norham ARP
Out of Borough	2.890	3.662	0.772	Increased number of children placed outside North Tyneside Schools
Commissioned services	3.888	4.037	0.149	
Sub-total	26.417	30.663	4.247	
2020/21 B/Fwd			8.720	
Total			12.967	

Special Schools and the Pupil Referral Unit (PRU)

- 3.5 There is a pressure of £2.440m relating to this area. The Authority has seen increasing numbers of children and young people within the education system with significant needs requiring specialist provision. This is particularly relating to Autism Spectrum Disorder (ASD) and Social, Emotional and Mental Health needs (SEMH). The Authority has increased the numbers of places within special schools to cope with this additional demand. Number of places have increased as follows:

Table 3: Increase in Special School Places in 2021/22

Special schools and Moorbridge	October Census 20	Planned Places 21	October Census 21	Annual Movement
Beacon Hill	190	193	192	2
Benton Dene	122	122	120	-2
Silverdale	102	110	110	8
Southlands (including Melrose Site)	161	161	163	2
Woodlawn	122	131.4	137	15
Total Special School	697	717.4	722	25
Moorbridge - PRU	135	105	135	0
Moorbridge - EHCP		30	54	24

- 3.6 Special schools are funded at £10,000 per place, with this increase in numbers representing an increased spend of £0.490m, plus a top-up based on a banding which is reflective of the needs of each individual child. Funding values for each banding is shown in Table 4 below. The majority of pupils attending special schools attract band 4 and band 5 top-up levels. The forecast cost of special school top-ups (excluding Moorbridge) has risen from a planned £5.599m to £7.062m.

Table 4: Special School Top Up Values by Banding

Band	Top up value £
Band 1	0
Band 2	3,341
Band 3	6,682
Band 4	9,507
Band 4	19,221

ARPS and Mainstream Top Ups (Pre 16)

- 3.7 There are pressures of £0.886m within Additional Resourced Provision (ARP) and top-up costs within mainstream schools due to increasing numbers of children and young people with additional needs and the rising average complexity of those needs. Top-up funding is paid to support children with additional needs in mainstream school. This is paid on the basis of an hourly rate reflecting the costs of additional staffing support outlined within the individual child's Education, Health and Care Plan (EHCP). Levels of top-up payments to mainstream schools have risen in the last four years with an overall increase in the numbers of children and a rise in larger packages of support reflecting the increasing complexity of needs.

Early Years Funding for 2022/23

- 4.1 On 17 December 2021 the Department for Education released the 2022/23 early years entitlement funding rates for local authorities. The Authority has modelled proposals for North Tyneside's early years funding formula 2022/23 and discussed 3 options with the Early Years Sub-Group on 6th January 2021. The Sub-Group's preferred option is outlined in the table below for Schools Forum consideration.

Table 5: Proposed Early Years Funding Rates

		2021/22	2022/23
2 Year Old Base Rate		£5.34	£5.54
3 & 4 Year Old Hourly Base Rate		£4.48	£4.60
3 & 4 Year Old Hourly Deprivation Supplement	Quartile 1	£0.16	£0.17
	Quartile 2	£0.06	£0.06
Early Years Pupil Premium		£0.53	£0.60
Additional Payment to Maintained Nursery School		100% pass through of Maintained Nursery School rate allocated by DfE.	100% pass through of Maintained Nursery School rate allocated by DfE.
SEN Inclusion Fund		£8.26 per hour & pro rata holiday pay	£8.26 per hour & pro rata holiday pay
Disability Access Fund		£615	£800

Central Schools Services Block Funding for 2022/23

- 5.1 Funding for the Central Schools Services block has been reduced by DfE in relation to historical funding by £0.199m, which represents a 20% reduction in funding for the historic commitments. Ongoing functions have had an increase of 5.22% as shown in table 6 below.

Table 6: Allocations for North Tyneside CSSB 2022/23

	2019/20	2020/21	2021/22	2022/23	Annual Change	
	£m	£m	£m	£m	£m	%
Historical Commitments	1.555	1.244	0.995	0.796	(0.199)	(20.00%)
Ongoing Functions	0.788	0.807	0.882	0.928	0.046	5.22%
Total	2.343	2.051	1.877	1.724	(0.153)	(8.15%)
Change from 2017/18 Baseline £m	-	(0.292)	(0.466)	(0.619)		
Change from 2017/18 Baseline %	-	(12.46%)	(19.89%)	(26.42%)		
Change per Year £m	-	(0.292)	(0.174)	(0.153)		
Change per Year %	-	(12.46%)	(8.48%)	(8.15%)		

- 5.2 The list of services provided via CSSB funding is listed in table 6. The net reduction in funding of £0.174m is identified in this table. Forum will recall from the December report that authorities can challenge the reasonableness of the reduction in funding by providing relevant evidence to the DfE.
- 5.3 Following consultation with School Forum in 2021/22, the Authority will set the funding for these services as identified in table 7 below. A sub-group of Schools Forum had previously agreed to take further savings from the School Support Service, who are expecting a further reduction of up to £0.143m. In addition, £0.020m was proposed as a further reduction in EIP funding.

Table 7: Illustrative allocations for North Tyneside CSSB for 2022/23

Budgets which now form part of the CSSB	CSSB 2021/22 £m	CSSB 2022/23 £m
Budget to fund the Schools Support Service	0.556	0.413
Budget to support vulnerable schools.	0.052	0.052
Budget to maintain High Borrans Outdoor education facility	0.000	0.000
Budget for the Education Improvement Partnership (secondary schools)	0.080	0.060
Budget to support the informational requests of the Schools Forum and improved budgetary awareness across all schools	0.030	0.030
Collective contribution to ongoing pension costs incurred when allowing teachers to leave schools prematurely	0.625	0.625
Budget for costs associated with de-commissioned school buildings	0.000	0.000
Schools admission service	0.142	0.142
Former Education Services Grant (Retained)	0.244	0.244
National Copyright Licences	0.148	0.158
Total CSSB Funding	1.877	1.724

- 5.4 The Authority will continue to work with Forum to identify any solutions to manage the long-term funding gap for service provision via other means, including but not limited to prioritising key outcomes and reviewing alternative funding such as under a service level agreement or similar.

De-delegated services

- 6.1 De-delegated services are for maintained schools only; funding for de-delegated services must be allocated through the mainstream formula but can be passed back, or 'de-delegated', for maintained primary and secondary schools with Schools Forum approval.
- 6.2 The list of proposals for de-delegations for 2022/23 is included in table 8 below:

Table 8: De-delegation proposals for 2022/23

Narrative	De-delegated 2021/22 £	De-delegated 2022/23 £	Rate per Pupil £
Budget to support mainstream maintained schools in financial difficulty (used for one year in 2021/22 to meet gap for CSSB)	127,726	123,426	5.62
Support for vulnerable Headteachers for those incidents where independent support and advice is necessary	37,272	36,018	1.64
Support for minority ethnic pupils and under-achieving groups. (EMTAS) NB: rate per pupil only applies to pupils that meet the EAL Threshold	193,605	225,210	565
			1,530
Assessment of Free school meals eligibility	35,909	34,700	1.58
The current central scheme to cover staff costs - supply cover. E.g. the maternity/paternity/adoption cover scheme, including Union facility time costs and Jury Service	595,902	592,974	27.00
Additional agreed funding for above staff costs to agreed 2020/21 6% increase			
Totals	990,414	1,012,328	

Recommendations

7.1 Schools Forum is asked to;

- Note update on the allocations for 2022/23 for each of the four funding blocks and the proposals for the distribution of funding;
- Note the changes to the Schools block funding and the impact of the changes following 100% movement to the NFF;
- Approve the services funded under CSSB as outlined in table 7;
- Acknowledge the pressure in the High Needs block;
- Acknowledge the changes to Early Years funding allocations proposed for 2022/23 and that the funding formula will be shared with the sector prior to implementation; and
- Approve the de-delegated items rate per pupil outlined in table 8.

Appendix A

Proposed School Block Rates for 2022/23 (100% National Funding Formula)

FACTOR	21/22 NFF (Incl. TPPG & Supplementary)		22/23 NFF (Incl. TPPG & Supplementary)		Difference 21/22 to 22/23	
	Primary	Secondary	Primary	Secondary	Primary	Secondary
Basic entitlement						
Primary (Years R-6)	3,123		3,217		94	
Key Stage 3 (Years 7-9)		4,404		4,536		132
Key Stage 4 (Years 10-11)		4,963		5,112		149
Deprivation						
FSM	460	460	470	470	10	10
FSM6	575	840	590	865	15	25
IDACI Band F	215	310	220	320	5	10
IDACI Band E	260	415	270	425	10	10
IDACI Band D	410	580	420	595	10	15
IDACI Band C	445	630	460	650	15	20
IDACI Band B	475	680	490	700	15	20
IDACI Band A	620	865	640	890	20	25
LAC (No longer used)						
EAL	550	1,485	565	1,530	15	45
Mobility	900	1,290	925	1,330	25	40
Prior Attainment	1,095	1,660	1,130	1,710	35	50
Lump Sum	117,800	117,800	121,300	121,300	3,500	3,500
Sparsity (N/A in NT)	45,000	70,000	55,000	80,000	10,000	10,000

Schools Block Allocation – 2022/23 (Subject to Final Amendments)

PHASE	NOR 21/22	NOR 22/23	Change in NOR	% Change NOR
Academies - Existing	3,222	3,281	59	1.83%
First	2,226	2,194	-32	-1.44%
Primary	10,579	10,490	-89	-0.84%
Academies - New	1,746	1,667	-79	-4.52%
Middle-deemed Secondary	1,955	1,933	-22	-1.13%
Secondary	7,266	7,345	79	1.09%
Grand Total	26,994	26,910	-84	-0.31%

22/23 Assumes 2% MFG, 4.99% Capping, £250k Falling Rolls, £250k Growth Fund			
21/22 Post MFG Budget	22/23 Post MFG Budget (Subject to final adjustments)	Movement from 21/22	% Increase from 21/22
17,457,561	18,117,111	659,550	3.78%
9,766,484	9,845,926	79,442	0.81%
55,498,403	49,139,091	1,285,230	2.32%
	7,644,542		
9,428,405	9,531,765	103,360	0.10%
44,111,723	45,595,020	1,483,297	3.36%
136,262,577	139,873,455 *	3,609,186	2.65%

*Includes £1.100m Rates allocation no longer included in the funding formula for previous year comparative purposes. Actual funding available to allocate to schools is £139.873m - £1.100m = £138.773m.