

Schools Forum

Thursday 9 November 2023

14:00

Oak Room, County Buildings, Stafford

The meeting will be webcast live and archived for 12 months. It can be viewed at the following link: <https://staffordshire.public-i.tv/core/portal/home>

John Tradewell
Deputy Chief Executive and Director for Corporate Services
1 November 2023

Agenda

- 1. Apologies**
- 2. Declarations of Interest**
- 3. Minutes of the meeting held on 13 July 23** (Pages 1 - 14)
- 4. Matters arising**
- 5. Decisions taken by the Chairman under delegated powers**
- 6. Termly Membership Review and Constitution Update** (Pages 15 - 38)
- 7. Notices of Concern and Licensed Deficit Agreements** (Pages 39 - 40)
- 8. Primary Behaviour Support Services - 2024-25 Financial Year** (Pages 41 - 52)
- 9. Minority Ethnic Achievement Service (MEAS) 2024-25 Financial Year** (Pages 53 - 62)
- 10. Schools Budget 2024-25: De-delegation, Central Expenditure and Education Functions** (Pages 63 - 76)

11. **High Needs Block Update and 0.5% Funding Switch Request** (Pages 77 - 102)

12. **Work programme and dates of next meetings** (Pages 103 - 106)

- Thursday 18 January 2024 – via Teams
- Thursday 21 March 2024 – via Teams
- Thursday 11 July 2024 – via Teams
- Thursday 17 October 2024 – in person meeting to be held at the County Buildings, Stafford.

Membership	
Stephen Drew	Abigail Rourke
William Wilson	Mark Boughey
Richard Sutton	Carolyn Trowbridge
Steve Swatton	Sarah Clark
Kim Prince Anson	Helen Barron
Philip Siddell	Jessica Roden
Richard Redgate (Chair)	Sadie Jones
Kirsty Rogers	Emily Verow
Chris Wright	Alun Harding
Steve Barr (Vice-Chair)	Craig Hodgson
Kevin Allbutt	Lindi Nejrup
Judy Wyman	Dawn Freeman
Vicki Lewis	Nicola Mason
Anne Tapp	Andrew Skelding

Notes for Members of the Press and Public

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Minutes of the Schools Forum Meeting held on 13 July 2023

Present: Richard Redgate (Chair)

Attendance	
Stephen Drew	Anne Tapp
Richard Sutton	Helen Barron
Steve Swatton	Jessica Roden
Philip Siddell	Sadie Jones
Chris Wright	Alun Harding
Steve Barr (Vice-Chair)	Lindi Nejrup
Judy Wyman	Nicola Mason

Observers: Steve Breeze and Jonathan Price

Apologies: Kim Prince Anson, Kevin Allbutt, Mark Sutton, Vicki Lewis, Abigail Rourke, Mark Boughey, Carolyn Trowbridge and Craig Hodgson

Part One

1. Declarations of Interest

There were no declarations of interest made on this occasion.

2. Minutes of the meeting held on 23 March 2023

Resolved: That the minutes of the meeting held on the 23 March 2023 be confirmed as a correct record and signed by the Chair.

3. Matters arising

Minute 30 – 23 March 23 - Nursery funding and wraparound childcare update

With regards Nursery Funding, the Forum was informed that confirmation had been received regarding nursery funding. The rate for three and four years olds was to be increased by 34p per hour, and there would be an increase of £1.88 per hour for two year olds. This would be implemented from September 2023 and run through to March 2024. It was expected that this increase would be passed through to the providers from the Autumn term onwards as per the Government Guidelines.

It was noted that the way in which the increase would be provided to the sector had yet to be agreed internally within the Authority. In response to a question asking at what point the local authority would speak to the sector to discuss this, it was confirmed that the decision would be shared

with the sector once it had been made.

Schools Forum members views that, the additional funding received should be provided through the 'base rate' to all early years providers, and not through deprivation indicators, were noted and would be considered when the decision was made.

Members were informed that there was no further detail available on the wraparound funding at the time of the meeting. It was agreed that the wraparound funding item would be brought back to a future meeting when more detail was available.

Minute 22 – Update to Minute 8 – 10 November 22 - Minority Ethnic Achievement Service (MEAS).

A question was asked as to whether there were any Afghan refugees in Stafford still living in hotel accommodation, as it had been highlighted in that all Afghan refugees who entered the country in 2021, and are still housed in hotels would be evicted from the 1st September 23.

N.B. Following the meeting an update was provided stating that no Afghan refugees were going to be evicted in Staffordshire.

Minute 22 – Update to Minute 18 - High Needs Block (including Education Banding Tool update and Deficit Management Plan)

A question was asked as to whether the delayed consultation of the Strategy for Special Provision had taken place, and if there was any feedback available. In response it was confirmed that the consultation had taken place and the results were currently being analysed, and some questions were being answered. It was confirmed that the results of the consultation would be brought back to a future Schools Forum meeting.

Minute 27 - Staffordshire Scheme for Financing Schools & Procurement Regulations

It was noted that the proposed updates to the Financial Regulations for Schools hadn't been updated on the Schools Learning Net. Officers were asked to update this as soon as possible.

Minute 28 - Schools Budget Update - WorthMore Group

The Forum was informed that Dr Robin Bevan, Head Teacher of Southend High School for Boys, was taking the lead on the WorthMore Group. With his Governors he was planning to mount a campaign to Government to highlight the situation of school funding. Robin Bevan was looking for support from other Head Teachers in joining the campaign, and if anyone

wished to get involved they were asked to contact the Schools Forum Vice-Chair.

4. Decisions taken by the Chairman under delegated powers

The Forum was reminded that, as per the resolution of **Minute 28 - Schools Budget Update**, it was agreed that a letter would be drafted on behalf of Schools Forum noting the specific issues being experienced by schools across Staffordshire, and sent on to the Secretary of State. The Chair informed the members that, under his delegated powers, the Vice Chair had been asked to Lobby his local MP on a recent visit to Parliament as a representative of ASCL.

The Forum was informed that the Vice Chair met with Lichfield MP, Sir Michael Fabricant, to discuss the issue of school funding within Staffordshire, and asked that some questions be tabled with the Secretary of State. These questions were:

1. To ask the Secretary of State to publish as soon as possible the report of the school teachers' review body, to accept its recommendations, and to urge the Treasury to fund in full those recommendations.
2. To ask the Secretary of State to reopen dialogue with the teacher and school leader unions.
3. To ask the Secretary of State to confirm that, following the checks currently being carried out on reinforced autoclave aerated concrete (RAAC), all necessary remedial action will be fully funded so as to ensure a safe environment for all those (both adults and children) working in schools.

These three questions had been condensed into two and the following responses were received:

Question: To ask the Secretary of State for Education, whether her Department plans to provide schools with funding to cover the full cost of (a) repairing and (b) replacing autoclave aerated concrete. (191998).
Tabled on: 03 July 2023.

Answer: Nick Gibb:

The safety of pupils and teachers is paramount. The Department has allocated over £15 billion since 2015 for keeping school buildings safe and in good working order, including £1.8 billion committed for 2023/24. In addition, the School Rebuilding Programme will transform buildings at 500 schools, prioritising poor condition and potential safety issues.

The Department have asked all responsible bodies, such as Local Authorities, academy trusts and voluntary aided school bodies, to inform the Department of the possible presence of reinforced autoclaved aerated concrete (RAAC) in their buildings and how they are managing it. The Department continues to urge all responsible bodies to contact us immediately if they have any serious concerns about their school buildings.

The Department is commissioning assessments of cases of suspected RAAC to confirm whether it is present and ensure appropriate and rapid action is taken to address any immediate risk, based on the advice of structural engineers. This can include funding support for capital works to remove any immediate risk and, where absolutely necessary, the provision of temporary buildings.

Longer term remediation of RAAC is supported by annual capital funding provided to the sector and the Department's rebuilding programme. The Department provides additional support on a case by case basis where there is a serious safety issue with a school building that cannot be managed independently by Local Authorities, academy trusts, and voluntary aided school bodies.

Question: To ask the Secretary of State for Education, if she will hold discussions with teacher and school leader unions on teachers' pay. (191997)

Tabled on: 03 July 2023

This question was grouped with the following question(s) for answer:

1. To ask the Secretary of State for Education, what recent discussions she has had with education unions on industrial action by their members. (192175). Tabled on: 03 July 2023.

Answer: Nick Gibb:

The Government and the education trade unions, the ASCL, NAHT, NASUWT and NEU, took part in a period of intensive talks between 17 March and 23 March 2023, with over 200 hours of Ministers' and officials' time spent on these talks, after which an in principle offer was made by the Government. This offer comprised a package of pay and non-pay related measures. Unfortunately, the four trade unions rejected this fair and funded offer.

Following the unions' rejection of the Government's March pay offer, teacher pay for next year will go through an independent pay review process as usual. The School Teachers' Review Body (STRB) makes recommendations on the pay of teachers in England and reports to the

Secretary of State for Education and the Prime Minister.

As part of the normal process, the STRB has now submitted its recommendations to the Government on teacher pay for 2023/24. The Department will be considering the recommendations and will publish its response in the usual way.

The Department will continue to engage regularly with teaching and leadership unions on policy developments as usual.

Resolved: That the update provided by the Vice Chair be noted.

5. Membership Update and Meeting Attendance Review

Members were informed that six positions on the Schools Forum had been up for election in May 2023. These included:

- One x All Maintained Primary
- Two x All Primary Academy
- One x All Secondary Academy
- One x All Academy Special Schools
- One x Alternative Provision Academies

By the closing date of the nomination period, one nomination for each of the vacant positions had been received, and, as such, it was not necessary to undertake an election process for any of the vacant positions. The positions had been filled with the following members:

- Maintained Primary – Vicki Lewis
- Primary Academy – Anne Tapp
- Primary Academy – Abigail Rourke
- Secondary Academy - Andrew Skelding
- Academy Special – Paul Spreadbury
- Alternative Provision – Richard Redgate

Chris Wright and Judy Wyman were also confirmed as the representatives of the Middle Schools Forum and Schools' Consultative Group respectively.

It was agreed that an up to date membership list would be provided to members.

Resolved: a. That the new and returning members be welcomed to the forum.

b. That an up to date membership list be provided to members.

6. Notices of Concern and Licensed Deficit Agreements

It was reported that, since the last Forum, two new Notices of Concern had been issued; St Peter's CE (VA) Primary School, Caverswall and All Saints CE (VC) Primary School, Ranton. Both Notices are a result of DfE Academy Orders.

The Entrust Schools Finance team continue to work with all schools who have existing Notice of Concern or Licensed Deficit agreement.

Resolved: That, the issue and withdrawal of Notice of Concerns to schools be noted.

7. Update to the Staffordshire Scheme for Financing Schools & Procurement Regulations

The Schools Forum received a report from the Director of Children and Families regarding an update to the Staffordshire Scheme for Financing of Schools (SSFS).

The Forum heard that the SSFS, Financial Regulations and Procurement Regulations had been reviewed and the following updates had been made:

- Paragraph 1.1, The Current Funding Framework, had been updated to refer to issue 15 of statutory guidance given by the Secretary of State as opposed to issue 14.
- Paragraph 2.15, Notice of Concern, had been amended so that the list which included reasons for a Notice and possible requirements of a Notice, had been split into two lists for ease of reading.
- Paragraph 5.4, Income from the Sale of Assets had been amended. The statement:

“Where the disposal of authority owned property generates a capital receipt, a proportion of the receipt may be made available to the school in accordance with the authority’s capital receipts policy”, had been removed and replaced with:

“Any retention of funds from the sale of land assets is subject to the consent of the Secretary of State, and any conditions the Secretary of State may attach to that consent relating to use of proceeds.”

- The Scheme of Delegation for Schools, shown at Appendix A to the report, had been updated. The new version would be uploaded to the Schools Learning Net.

A number of queries were raised by Forum members regarding the example Scheme of Delegation shown at Appendix A to the report. It was explained that the example Scheme of Delegation had been produced by the Staffordshire County Council Internal Audit team, and it was agreed that they would be asked to revise the example before it was published. The Vice Chair also offered to share the Scheme of Delegation document with the MyFinance Schools Forum Group for discussion.

Resolved: a. That the revised Staffordshire Scheme for Financing Schools (SSFS) and Schools Scheme of Delegation be approved.

b. That the Vice Chair be asked to share the Scheme of Delegation document with the MyFinance Schools Forum Group for discussion.

8. Growth Fund - Allocation Funding 2023/24

The Schools Forum received a report from the Director of Children and Families relating to the Growth Fund - Allocation of Funding 2022/23:

It was explained to the Forum that in accordance with the infant class size criteria, £143,611 would be allocated to five schools based on an agreed number of additional infant class teachers.

It was further explained that in accordance with the basic need growth criteria, £322,210 would be allocated to five schools that worked with the Local Authority to meet exceptional population growth locally by creating an additional class (in primary schools) or exceeding PAN by at least 5% (by middle and secondary schools).

Finally, the Forum heard that in accordance with the new schools' criteria, a total of £405,750 would be allocated for post-opening costs for six new free schools with an opening date between 2019/20 and 2022/23 and pre-opening costs for three new free school planned to open in 2023/24.

Resolved: That the allocations of Growth Fund for:

a. funding for infant class size legislation - six primary schools, be noted.

b. funding for exceptional basic need growth - one primary school, two high schools and two secondary schools, be noted.

c. funding for new schools - pre-opening costs for three new free schools opening in 2024/25, and post-opening costs for six free schools opened between 2019/20 and 2022/23, be noted.

9. Schools Budget 2022/23 Final Outturn

The Schools Forum received the Schools Budget 2022/23: Final Outturn Report of the Director of Finance. The following points were discussed:

- The outturn position for 2022/23 was a £6.0m variance (2.0%) overspend on planned expenditure across all services.
- The High Needs service had overspent by £9.1m (11.1%). This was offset by an underspend in the Early Years block of £1.5m (2.8%), and an underspend in the Central and De-Delegated blocks of £0.2m (2.8% of the budget).
- At the end of the financial year there was an accumulated deficit of £14.2m up from £8.6m at the end of the previous year. The Forum was informed that Staffordshire County Council was not alone in this difficult financial situation.
- The Council's Deficit Management Plan outlined the targeted interventions that would seek to mitigate the existing shortfall, but it was acknowledged that this would take time to make an impact.
- As at the 31 March 2023, maintained schools held reserves of £20.1m; a decrease of £4.18m from the position on 31 March 2022. There continued to be a number of approved licenced deficits (19 schools, with a value of £1.9m). The authority continued to work with those schools to manage this situation.

In response to a question asking if the schools balances had decreased because there had been a reduction in maintained schools, it was confirmed that the figures reported were "like for like". The balances or deficits relating to any schools that had converted to academies had been removed from the figures.

In response to a question asking whether the number of schools with licensed deficits had increased or decreased from 2021/22 to 2022/23, it was confirmed that the number had increased from 15 to 19 over the year.

In response to a question asking if the local authority held a view on schools holding reserves, it was explained that the authority would expect schools to have positive balances rather than deficits. Notwithstanding the pressures being faced by schools at this particular time, it was considered acceptable for primary schools to hold 8% reserve, and secondary schools to hold 5% reserve.

Resolved: That the 2022/23 Schools Budget financial outturn be noted.

10. High Needs Block including Deficit Management Plan

The Schools Forum received a report from the Director of Children and Families relating to the High Needs Block (HNB).

The Forum was informed that the forecast overspend for the 2023/24 HNB was £18.0m. The current HNB budget for 2023/24 in Staffordshire was £127.0m; an increase of £12.0m compared with 2022/23. None of this funding increase would be used to repay historical deficits. Staffordshire currently had c7,000 Education, Health and Care Plans (EHCP) in place; an increase of 33% in the last three years.

At the end of the last financial year the DSG reserve 'deficit' increased from £8.6m to £14.2m. Given the forecast overspend in 2023/24 this would likely deepen further in 23/24 and was expected to be over £30m in deficit at the end of the current year. The Government had put in place a 'statutory override' requiring that accumulated DSG deficits would remain ringfenced separate to the Council's other reserves - this had now been extended through to end of 2025/26. Left unaddressed the accumulated deficit would likely reach c£100m by the end of 2025/26. This was highlighted as the Authority's most significant financial risk.

The Forum was reminded of the introduction of the Deficit Management Plan (DMP) which included actions that could be taken to address and mitigate the existing shortfall. To date the DMP had had little impact and was currently being updated. A meeting was also scheduled to be held with the Education and Skills Funding Agency (ESFA) in the Summer of 2023 to discuss the latest position.

It was recognised that position was far worse than had been previously expected, partly on the grounds of the increased raises on the Education Banding Tool (EBT) model. It was intended that the EBT would be cost neutral when it was introduced, but there had been a clear and marked increase in the average costs of those children assessed under the EBT model, compared to those that remained on the existing matrix model in both special schools and mainstream schools, with a significantly higher number of children being assessed on the banding levels of 8 to 10.

For the children who had transitioned from the matrix model to the EBT funding model, it was estimated that an additional £5m had been incurred to date, and this figure would only increase if the situation was not addressed. Given the existing deficit, this was considered unaffordable.

It was highlighted that two of the key actions included in the DMP related to the increase of the number of Children and Young People (CYP) with EHCPs who accessed mainstream education, and the review of the specialist

provision (mainstream, special and alternative provision) including enhanced provision in mainstream schools. It was hoped that this would be expedited quickly to ensure there was sustainable provision across the county that would meet current and future needs and demands.

The Schools Forum was informed that the authorities senior leadership team and Cabinet members had sent a briefing note to all local MPs outlining the particular challenges associated with the HNB and the pressure on the Dedicated Schools Grant (DSG). It was agreed that the briefing note would be shared with Forum members.

Resolved: a. That the High Needs Block budget 2023/24 and latest forecast outturn be noted.

b. That the briefing note sent to local MPs be shared with the Schools Forum.

11. Education Banding Tool

The Schools Forum received a report from the Director of Children and Families relating to a review of the Education Banding Tool (EBT). The following points were discussed:

- Following the implementation of the EBT in March 22, 24.2% (1,209) of pupils with an EHCP, in scope of the EBT, had their Element 3 top up funding calculated through the EBT. A significantly higher than expected level of pupils had been allocated to Level 9 and above of the EBT.
- 11 of the 23 special schools had over 50% of their pupils who had been taken through the EBT on Levels 9 and above.
- Previously 44% of pupils in special schools were funded at Matrix Level 3, this equated financially to the EBT Level 8b. However, there were now 50% of pupils funded at EBT Levels 8b and above.
- Imosphere, who created the banding tool, undertook an annual health check and raised a concern with the authority that there was a significant number of CYP banded in the top levels of the EBT.
- Whilst the number of children assessed on the EBT remained relatively low, the average 'top up' cost for those placements in special schools was significantly higher than compared with the matrix model.
- A benchmarking exercise against other local authorities had been undertaken by Imosphere. The results showed that the values

placed on the SCC banding levels were significantly higher than other authorities. These levels had been set using the pilot data, against what was considered affordable.

- The Schools Forum was reminded that the authority always intended to undertake a review of the EBT, and it had been reported during previous HNB updates at past meetings that there was a concern around the increased costs associated with the EBT.

It was announced by the Assistant Director for Education Strategy and Improvement, that the situation had worsened since the writing of the report, and the Education Banding Tool would be suspended with immediate effect, pending work to be undertaken to improve the process and bring it back into a cost neutral position. It was confirmed that the authority would revert back to the original funding arrangements for mainstream and special schools. As reported, there were currently 25% of children on the EBT, with 75% being funded through the original arrangements, and it was confirmed that these funding arrangements would remain in place, but all new assessments would be carried out through the original funding arrangements.

The Chair of the Forum raised the issue that no consultation process had taken place with Schools, he also asked how much money had been spent on implementing a system that was now considered to be unfit for purpose. In response it was acknowledged that there had been no consultation on the announcement, but the decision had to be made quickly, and it was highlighted that the model being reintroduced had already been approved by Schools Forum and was currently being used for c75% of children on the HNB. The Assistant Director for Education Strategy and Improvement asked that evidence be provided that demonstrated how the money had been wasted, it was agreed that this discussion would continue outside of the Schools Forum meeting environment.

The Head of SEND explained that Key Workers were implementing information that had been provided by schools. It was an administrative role and there were no clinical judgements being made. Settings provided evidence that ticked boxes of higher bands, with the authority being duty bound to make sure the support was delivered. Communication had been received from schools that stated they would not take CYP unless they were band 9 or above. This had left the authority in a difficult position, because this was not the basis on which the EBT had been designed. It was designed to identify, and fund need accurately, it was not designed to be used as a tool for bartering. When schools informed the authority that they would not make provision for children on a bands 7, 8 or 9, the decision had to be made to go to the independent sector, which was not a cost-efficient way of working. The national context demonstrated that

there had been an increase in need, and higher levels of need, accelerated by Covid, particularly in mainstream settings which was, inevitably, filtering into the special provision.

The Chair further voiced his frustrations that there appeared to have been no quality control, and suggested that a process had been implemented that hadn't been managed correctly. In response to a question asking if there had been a contingency plan relating to any overspend, it was confirmed that, notwithstanding the announcement to suspend the EBT with immediate effect, the process had been monitored since it had been implemented. Initially the sample sizes of CYP on the EBT were too small to allow any conclusions to be drawn, however as those sample sizes increased it became apparent that the EBT was costing more money than anticipated. The Forum was reminded that the EBT was always intended to be cost neutral, whilst the authority never intended to implement a process to save money, neither did it intend for it to cost money, which was what had started to occur and why the process had been suspended.

In response to a question asking for assurances that the CYP already in the system would continue to receive the level of support and funding they had been originally allocated through the EBT, it was confirmed that, whilst there may be a need to review funding to the EBT, at this moment in time, where funding had been agreed as part of an EHCP either in a mainstream or special school, it would continue to be provided and applied to any changes that may come about as a result of any future changes to the EHCP.

In response to a question asking for more detail regarding the health funding for individual pupils with medical needs, and the fact that EHCPs seemed to focus on "Education", above "Health" and "Care", it was explained that there had been significant progress in this field and health colleagues were now involved in discussions. They had been made aware of the integral role they played to the process, and discussions had taken place to consider what was able to be delegated to schools, and the areas that Health colleagues would be funding.

In response to a question asking if schools had been challenged on decisions to only take CYP on a Band 9 or above, it was confirmed that most schools had worked collaboratively with the authority, schools that had stated they would only be willing to take children on a higher band had been challenged.

In response to a question asking when schools were expected to revert back to the original funding arrangements, it was confirmed that any applications that had been received before the announcement had been made would be honoured and taken through the EBT process, but any applications that had not yet been submitted would need to be submitted

under the old application process. It was confirmed that this information would be communicated to Schools in the week beginning 17 July 23.

Resolved: a. That the Education Banding Tool review be noted.

b. That the announcement to suspend the Education Banding Tool with immediate effect, be noted.

12. Election of Chair and Vice Chair

Appointment of Chair

Resolved: That Richard Redgate be elected as Chair of the Schools Forum for a two-year period until July 2025.

Appointment of Vice Chair

Resolved: That Steve Barr be elected as Vice Chair of the Schools forum for a two-year period until July 2025.

13. Work Programme and date of next meeting

The future work programme, date of next meeting and future meetings were shared with forum members.

Date of next meetings

- Thursday, 9 November 2023, 2:00pm - face to face meeting to be held at the County Buildings, Stafford.
- Thursday, 18 January 2024, 2:00pm – via Teams.

Resolved: That the dates of the next meetings be noted.

Chair

Schools Forum – 9 November 2023

Staffordshire Schools Forum Termly Membership Review and Constitution Update

Executive Summary:

- The Schools Forum school membership was reviewed in September 2023 to confirm that the proportions of school representatives remained broadly comparable to the pupil numbers in each of these categories. The results of that review are presented for note by Forum members.
- At the same time the opportunity was taken to make some minor amendments to the constitution.
 - References to the “Prosperous Staffordshire Select Committee” have been changed to “Prosperous Overview and Scrutiny Committee”.
 - Alterations have been made to the style and format of the Schools Forum constitution to ensure it remains in line with current County Council brand guidelines.

Recommendations:

That Schools Forum:

- notes the update to Appendix C of the Schools Forum Constitution;
- notes the change of the reference from the Prosperous Staffordshire Select Committee to the Prosperous Overview and Scrutiny Committee;
- notes the changes of the logo and branding of the Staffordshire Schools Forum Constitution;
- agrees to allow future amendments to Appendix C of the Schools Forum Constitution to be undertaken by the Chair under designated powers.

Report of Director for Children and Families

PART A

Reasons for recommendations:

1. To ensure the Schools Forum constitution continues to provide accurate membership information, and remains in line with County Council reporting processes and branding guidelines.

PART B

Background

2. As per section 3.3 of the Schools Forum Constitution, a process is undertaken by the local authority at the beginning of each term to confirm the proportions of maintained and academy school representatives are broadly comparable

to the pupil numbers in each of these categories.

3. The last review took place in September 2023. These results are available at Appendix 1 of this report. This information has also been updated at Appendix C of the Schools Forum constitution.
4. Whilst this process was carried out the opportunity was also taken to make some minor amendments to the Schools Forum constitution.
5. The majority of the document agreed in March 2021 remains in place, however some alterations have been made so that it remains in line with current County Council scrutiny processes, and logo and brand guidelines.
 - 5.1 Two references to the “Prosperous Staffordshire Select Committee” contained in paragraph 1.3 and Appendix A of the document have been amended to reference the “Prosperous Overview and Scrutiny Committee”.
 - 5.2 The front cover has been updated to include the current County Council logo and branding.
6. It is proposed that the approval of future amendments to Appendix C of the Schools Forum Constitution be undertaken by the Chair under their designated powers, with the information presented to members for note at the next scheduled Schools Forum meeting.
7. The updated Constitution can be found at Appendix 2 to this report.

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Termly review of membership of Staffordshire Schools Forum September 2023

The total number of Schools Forum maintained schools and academy members is 23. The Schools Forum regulations state that, where there are any, there must be one member for each of the following: maintained nursery schools, maintained special schools, maintained PRUs, special academies and alternative provision academies. This is the case in Staffordshire so there are 5 members from these schools and academies (1 from each type - 5 members). This means that 18 Schools Forum school members represent the mainstream primary and secondary schools and academies.

NoR as at latest Schools Census date - May 2023 and school status as at 01.09.2023

Phase	Maintained - NoR		Academy - NoR		Grand Total	
Primary Phase	22,455	34.2%	43,170	65.8%	65,625	53.8%
Secondary Phase	6,172	10.9%	50,267	89.1%	56,439	46.2%
Grand Total	28,627	23.5%	93,437	76.5%	122,064	100%

Number of primary members is 53.8% of 18 = 9.7

Rounded to the nearest whole number, **10 primary members** are required.

Number of secondary members is 46.2% of 18 = 8.3

Rounded to the nearest whole number, **8 secondary members** are required.

Staffordshire Schools Forum has members from the middle and secondary headteachers forums and one primary member nominated by all schools and academies deemed primary (1 from each -3 members)

Number of maintained primary members is 34.2% of 9 = 3.1

Rounded to the nearest whole number, **3 primary maintained members**

Number of academy primary members is 65.8% of 9 = 5.9

Rounded to the nearest whole number, **6 primary academy members**

Number of maintained secondary members is 10.9% of 6 = 0.7

Rounded to the nearest whole number, **1 secondary maintained members**

(NB there has to be at least 1 maintained secondary school member, where there is at least 1 maintained secondary school)

5 secondary academy members

Based on the calculations above, schools members of Schools Forum are as follows:

10 primary Schools Forum members

- 1 primary school representative (in lieu of primary school headteacher- forum nomination)
- 3 primary maintained school representatives
- 6 primary academy representatives

8 secondary Schools Forum members

- 1 middle school headteacher forum nomination
- 1 secondary school headteacher forum nomination
- 1 secondary maintained school representatives
- 5 secondary academy representatives

Staffordshire County Council Schools Forum

Constitution

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(Revised May 2023)

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Section	Contents	Page
1	<u>Introduction</u>	5
2	<u>Establishment of the Schools Forum</u>	5
3	<u>Membership</u>	5
	General	5
	School Members Term of Office	6
	Non-Schools Members Term of Office	6
	Schools Members – Nomination, Election and Appointment	7
	Election Procedure	8
	Non-schools Members – Nomination and Appointment	9
4	<u>Proceedings of Schools Forum</u>	9
	Meetings	9
	Substitutes	9
	Local Authority Officers, Observers & Visitors	10
	Quorum	10
	Decisions	10
	Forum Sub-Groups	11
	Officers	11
	Administration	12
	Confidentiality	13
	Conflicts of Interest	13
	Proceedings	13
5	<u>Functions</u>	13
	Consultation with the Schools Forum on the school funding formula	13
	Consultation on contracts	13
	Consultation on financial issues	14
	Reports by the Forum	14
	Other functions	14
	Provision of account to schools	14
	Consultation	14
6	<u>Expenses</u>	15
	Forum’s Expenses	15
	Members’ Expenses	15

Appendix	Contents	Page
A	<u>Staffordshire County Councils Schools Forum Membership</u>	17
B	<u>Membership Selection, Nomination and Appointment Timetables</u>	19
C	<u>Termly review of membership process</u>	20

1 INTRODUCTION

- 1.1 The Education Act 2002, amended the School Standards and Framework Act 1998, to require each Local Authority (LA) to establish a Schools Forum, its function being to advise the LA on matters relating to their Schools Budget and to advise the LA or be a consultative body in relation to other prescribed matters. Currently, the [Schools Forums \(England\) Regulations 2012](#) (as amended) regulate the composition, constitution and procedures of a Schools Forum.
- 1.2 Although made up mainly of representatives from maintained schools and academies, it can also include “non-school” members, representing relevant bodies.
- 1.3 Within Staffordshire County Council, such non-school representation includes Diocesan representatives, representatives from the Early Years PVI Sector, representatives from 16-19 Education, representatives from the authority’s School Consultative Groups and a Parent Governor representative from the Prosperous Overview and Scrutiny Committee.
- 1.4 As elected members attend these meetings as observers, the Schools Forum forms an important link back into political decision making processes.

2 ESTABLISHMENT OF THE SCHOOLS FORUM

- 2.1 Staffordshire County Council (“the Council”) has established and will maintain a Schools Forum (“the Forum”) in accordance with the requirements of section 47A of the School Standards and Framework Act 1998, and subsequent regulations as may be amended from time to time.

3 MEMBERSHIP

General

- 3.1 The Forum will usually have a maximum of thirty two (32) members, composed of those persons specified in Appendix A. However, in order to accommodate the rate of academy conversions, the size of the Forum may be temporarily increased in order to appoint additional academy representatives, then take out maintained school representative vacancies when one arises.
- 3.2 At least two-thirds of the total membership will consist of maintained school and academy representatives; the proportion of maintained and academy primary and maintained and academy secondary members being broadly comparable to the pupil numbers in each of these categories.
- 3.3 Detailed in Appendix C is the process undertaken by the local authority at the beginning of the second week in September, January and April each year in order to ensure the numbers of schools representatives are broadly comparable to the pupil numbers in each category.
- 3.4 The Council shall maintain a record of the composition of the Forum, including:
 - (a) The number of schools members and by which group or sub-group they were

- elected;
- (b) The number of academies members; and
- (c) The number of non-schools members, their terms of office, how they were chosen and whom they represent.

School Members Term of Office

- 3.5 Schools members are appointed to the Forum for a term of 4 years in most cases unless agreement has been reached to the contrary. To ensure continuity of experience within the Forum membership, elections will be held every 2 years and, where appropriate, half of the representatives of each group will be appointed on each election date. The details of the election process is set out in Appendix B. However, where the school of a maintained school representative has converted to an academy, the Forum could consider appointing this member as an academies member until their current term of office ends.
- 3.6 To ensure the effectiveness of the decision making process surrounding the use of public money, all Schools Forum members are expected to attend the Forum meetings. Apologies must be made in advance of each meeting. Members' apologies will be considered at the Forum meeting and accepted if agreed by the majority of attending members. Where a member has not attended 3 consecutive meetings of Schools Forum and apologies have not been formally accepted, the Council will terminate their appointment and will undertake the appropriate nomination, election and appointment process.
- 3.7 A schools member will cease to be a member of the Forum:
- (a) if they resign from their position on the Forum by giving written notice to the Council;
 - (b) upon the expiry of their term of office;
 - (c) in the event of their death;
 - (d) if they cease to hold the office by virtue of which the member became eligible for election, selection or appointment to the Forum, except where the provisions of paragraph 3.5 apply;
 - (e) if the Council terminates their appointment because the member has not attended 3 consecutive meetings of Schools Forum and apologies have not been formally accepted by the Forum; or
 - (f) if the Council terminates their appointment because it has been instructed to do so by the Secretary of State.

Non-Schools Members Term of Office

- 3.8 The Council will seek nominations for non-schools members from the relevant bodies as identified in Appendix A. The Council will normally ask the relevant bodies to nominate non-school members every four years. Existing non-school members shall continue until a replacement is appointed.
- 3.9 A non-schools member will cease to be a member of the Forum:
- (a) if they resign from their position on the Forum;
 - (b) when the relevant body makes a further nomination to replace him/her and the Council appoints him/her;
 - (c) in the event of their death;
 - (d) if they cease to hold the office by virtue of which the member became eligible for election, selection or appointment to the Forum;

- (e) if the Council terminates their appointment because the member has not attended 3 consecutive meetings of Schools Forum and apologies have not been formally accepted by the Forum;
- (f) if the Council terminates their appointment because it has been instructed to do so by the Secretary of State.

3.10 No person who is an executive member or relevant officer of the authority is eligible to be nominated as a non-schools member. A “relevant officer” refers to:

- a) the director of children’s services of the authority,
- b) any officer employed or engaged to work under the management of the director of children’s services, other than one who directly provides education to children or who manages such a person, or
- c) any officer whose work involves management of, or advice on, school funding.

3.11 The Council will arrange for vacancies on the Forum to be filled using the nomination, election and appointment processes detailed below.

Schools Members – Nomination, Election and Appointment

3.12 The Council will appoint as schools representatives those persons duly elected and nominated via the following process (and outlined on the Schools Forum Website).

Maintained Schools Members:

3.13 School members must be elected to the Schools Forum by the members of the relevant group, or sub-group, in the Council’s area. The groups are:

- (a) Representatives of nursery schools (where there are any such schools in the Council’s area);
- (b) Representatives of primary schools other than nursery schools (where there are any such schools in the Council’s area);
- (c) Representatives of secondary schools (where there are any such schools in the Council’s area) ;
- (d) Representatives of special schools (where there are any such schools in the Council’s area);
- (e) Representatives of pupil referral units (where there are any such schools in the Council’s area).

Academies Members:

3.14 Academies members must be elected to the Forum by the proprietors of academies in the Council’s area.

- (a) Representatives of primary academies other than nursery schools;
- (b) Representatives of secondary academies;
- (c) Representatives of special academies (where there are any such schools in the Council’s area);
- (d) Representatives of academy pupil referral units (where there are any such schools in the Council’s area).

Election Procedure

- 3.15 For maintained schools, in the event that there is more than one candidate for a vacant position or a position which is subject to election in that year within any of the groups set out in paragraph 3.13, the head teacher and chair of governors of every school within the relevant group will be invited to vote for one (1) candidate each. For each position, the candidate who receives the largest number of votes will, subject to paragraphs 3.19 and 3.20, be appointed to that position and the candidate who receives the second largest number of votes will be appointed, subject to paragraphs 3.19 and 3.20, if the candidate who receives the largest number of votes also receives the largest number of votes for another group in which they stood for election.
- 3.16 For academies, in the event that there is more than one candidate for a vacant position or a position which is subject to election in that year within any of the groups set out in paragraph 3.14, the proprietors of mainstream academies of every school within the relevant group will be invited to vote for one (1) candidate each. For each position, the candidate who receives the largest number of votes will, subject to paragraph 3.19 and 3.20, be appointed to that position and the candidate who receives the second largest number of votes will be appointed, subject to paragraphs 3.19 and 3.20, if the candidate who receives the largest number of votes also receives the largest number of votes for another group in which they stood for election.
- 3.17 In the event that two or more candidates for a position receive an equal number of votes or if for any reason an election for a position does not take place by the timescales set out in the election schedule set out on the Schools Forum website the Forum must appoint a member to the Forum instead.
- 3.18 In the event that there is only one candidate for a vacant position or a position which is subject to election in that year within any of the groups set out in paragraphs 3.13 and 3.14, it will not be necessary for members to vote, and that candidate will, subject to paragraphs 3.19 and 3.20, be appointed to the position.
- 3.19 In the event that there are no applications from any of the groups of schools subject to an election in that year, then the Forum members who represent the relevant group which has the vacancy shall nominate the representative to be appointed. Where the vacancy is for the single representative for the relevant group, i.e. there are no other members to make a nomination, then the Forum will seek to appoint the member from that group of schools.
- 3.20 It is not appropriate for a candidate to be elected to represent more than one group, however, they may stand for election from any group(s) but can only be appointed to represent one of the groups.
- 3.21 The Council reserves the right not to appoint any person duly entitled by the processes above, for any reason.

[NOTE: Proprietor in relation to an academy means the person or body of persons responsible for the management of the academy].

Non-schools Members – Nomination and Appointment

- 3.22 The Council will seek nominations for non-schools members from the relevant bodies identified in Appendix A and in accordance with the schedule set out on the Schools Forum website.
- 3.23 Upon receipt of a nomination under paragraph 3.21, the Council will:
- (a) make an appointment pursuant to that nomination; or
 - (b) provide the relevant body with the grounds on which they determine not to make such an appointment.
- 3.24 Where the Council has proceeded under paragraph 3.22(b), 3.9(e) or 3.9(f) it will seek a further nomination from the relevant body concerned.
- 3.25 Through publication on the Schools Forum website the Council will inform all maintained schools and academies in its area of the name of the member appointed as a non-schools member and the name of the relevant body that that member represents, within one month of the appointment.

4 PROCEEDINGS OF SCHOOLS FORUM

Meetings

- 4.1 The Forum must:
- (a) hold a meeting at least four (4) times in each academic year;
 - (b) agree where meetings should take place and the time of its meetings;
 - (c) hold a meeting in response to a request from:
 - (i) one-third of its members; or
 - (ii) the Chair, provided that this does not conflict with any directions given by the Forum.
 - (d) hold meetings in public, but visitors should be asked to leave if confidential items are discussed, unless the Forum have asked them to take part in a specific discussion.
- 4.2 The Council shall agree the frequency and timing of meetings of the Forum in consultation with the Forum in advance of each academic year. Whilst setting out the cycle of meetings, where possible, the Council will provide a clear overview of key consultative and decision-making points in the school funding cycle.

Substitutes

- 4.3 In the event that a member is unable to attend any meeting, that member may seek the Chair's permission no later than 48 hours prior to the meeting, subject to paragraph 4.4, to have a named substitute attending in their place, and such permission will not be unreasonably withheld.
- 4.4 The notice period referred to in paragraph 4.3 is waived where substitution is in respect of a meeting where levels of delegation are subject to a vote of the Schools Forum and no notice period should apply in these circumstances.
- 4.5 A named substitute will have the same rights as a member of the Forum.

Local Authority Officers, Observers & Visitors

- 4.6 The following persons shall be entitled to speak at such meetings even though they are not members of the Forum:
- (a) the Director responsible for education and children's services or their representative;
 - (b) the Section 151 Officer or their representative;
 - (c) any elected member of the authority who has primary responsibility for children's services or education in the authority;
 - (d) any elected member of the authority who has primary responsibility for the resources of the authority;
 - (e) any person who is invited by the Forum to attend in order to provide financial or technical advice to the Forum;
 - (f) an observer appointed by the Secretary of State; and
 - (g) any person presenting a paper or other item to the Forum that is on the meeting's agenda, but that person's right to speak shall be limited to matters related to the item that the person is presenting.

Quorum

- 4.7 The Forum will be quorate if at least forty percent (40%) (rounded up to a whole number) of the total current membership in position is present at a meeting, except where paragraph 4.21(d) applies.

Decisions

- 4.8 The Forum will unless otherwise stated within this document, arrive at its decisions by consensus.
- 4.9 However, if it is necessary to take a vote the following arrangements apply, subject to paragraph 4.10:
- (a) every member of the Forum will have one (1) vote;
 - (b) a resolution will be passed by simple majority, subject to the following provision; and
 - (c) where there are an equal number of votes for and against a proposal, the Chair will have the casting vote.
- 4.10 Where the vote is in respect of arrangements where voting requirements are set by government regulations, those regulations shall apply. In these circumstances the authority will highlight the voting arrangements which will apply in the Schools Forum papers supporting the vote. Currently, such arrangements include but are not limited to the following:
- (a) Voting on the funding formula is limited to schools members, academies members and PVI representatives;
 - (b) Voting on de-delegation is limited to the specific primary and secondary phase of maintained schools members; and
 - (c) Voting on retaining funding for statutory duties relating to maintained schools only is limited to maintained primary, secondary, special and PRU group members.
- 4.11 Once a decision has been taken, all members will be bound by it, but any member can ask for their opinion to be recorded in the minutes.

Forum Sub-Groups

- 4.12 The Forum may establish sub-groups from their membership to consider in detail specific issues on their behalf and report their findings back to them.

Officers:

Chair and Vice Chair:

- 4.13 The Schools Forum must elect the Chair and Vice Chair from amongst its own members. The election of Chair and Vice Chair will take place at the final meeting (usually July) of the school year for a period of two years. Elections will take place only every two years unless either post becomes vacant (see 4.22). The Chair and Vice Chair will hold office until a decision has been reached about their successors at any meeting or until they are no longer members of the Forum.
- 4.14. The Chair and Vice Chair will take up their appointments at the first Schools Forum meeting in the new school year (usually October) following their election. This is to allow for a smooth transition between chairs and to aid the continuity and efficiency of Schools Forum.
- 4.15 Any elected member of the Council or officer of the Council who is a member of the Schools Forum may not be elected as Chair or Vice Chair.
- 4.16 The election of the Chair and Vice Chair will be an agenda item at the final meeting of the school year (usually July) with sufficient time for those nominated to provide a verbal presentation to the Schools Forum as to their skills and suitability for the positions . This will take place only every two years unless either post becomes vacant (see 4.22).
- 4.17 The Chair and Vice Chair will indicate, in advance of the meeting in which the election is due to take place, whether they wished to stand for re-election and this information will be included in the papers circulated to Forum members ahead of that meeting.
- 4.18 In the event that there is only one (1) candidate for each position, it will not be necessary for members to vote, and those candidates will be appointed to the positions.
- 4.19 If for any reason it is not possible to reach a decision regarding the persons to be appointed to the positions of Chair or Vice Chair, the matter will be considered at the next meeting of the Forum.
- 4.20 The Clerk to the Forum must act as Chair during the part of the meeting at which appointments to the posts of Chair or Vice Chair are considered.
- 4.21 All candidates must comply with the paragraphs in this document on Conflicts of Interests and leave the meeting at which their suitability for either of these positions is to be discussed.
- 4.22 The Chair and Vice Chair may resign from their posts at any time by giving written notice to the Clerk and can be removed from the post with immediate effect in the event that a resolution to remove the Chair or Vice Chair has been passed at two consecutive meetings which have been convened in accordance with the following rules:
(a) seven (7) clear days' notice of each meeting is given;

- (b) removing the Chair or Vice Chair is a specific item on the agenda for both meetings;
- (c) there are at least fourteen (14) days between the two meetings;
- (d) there are at least two-thirds of the members (rounded up to a whole number) at both meetings, and before the vote at the second meeting, the member proposing the removal of the Chair or Vice Chair states reasons for the proposal, and the Chair or Vice Chair is given an opportunity to make a statement in reply.

Acting Chair:

- 4.23 If the Chair is unable to attend any meeting, or if the post is vacant, the Forum members will elect one of those members present to Chair that meeting only, normally being the Vice-Chair.

Clerk:

- 4.24 The Clerk to the Forum will be appointed by the appropriate Director responsible for education and children's services and will convene, direct, offer advice on procedure and minute meetings in accordance with directions given by the Forum.
- 4.25 The Clerk will not have either a vote or a casting vote when in the position of acting Chair in accordance with paragraph 4.18.

Administration

- 4.26 Every member of the Forum will be given at least seven (7) days' written notice of the date of a meeting with a copy of the agenda for that meeting. This is to enable members to consider the papers and if necessary obtain views from the group they are representing. The notice and agenda will be sent out by the Clerk to the Forum. A copy of the paperwork will be sent to the Director responsible for education and children's services at the same time as to members of the Forum. Shorter notice can only be given if the Chair (or the vice-Chair if the Chair is absent or the position has not been filled) agrees that there is an urgent need for a meeting. Members can be contacted/consulted by email on matters of urgency. Meetings to consider the removal of the Chair or a co-opted governor must be convened with at least seven (7) clear days' notice. Papers are published on the Council's website to enable representations to be made to Forum members and to ensure that all interested groups are able to access the papers prior to a meeting.
- 4.27 The agenda will be agreed by the Chair of the Forum. The Forum will whenever necessary consider and revise an annual work programme for meetings.
- 4.28 Minutes of each Forum meeting must be taken by the person acting as Clerk. A copy of the draft minutes will be circulated to members within two (2) weeks of the meeting or as soon as possible thereafter, prior to their formal approval at the next meeting,
- 4.29 The Clerk must make sure that copies of the agenda, draft and approved minutes and any report, document or other paper considered at a meeting (not including confidential items) are made available at County Buildings for anyone to read. Agendas, reports and minutes should also be promptly posted on the Forum's website.

Confidentiality

- 4.30 The following information which may be presented, discussed and voted upon at any meetings of the Forum, must be kept confidential:
- (a) the votes of individual members;
 - (b) opinions by members involving a named person which are in any way sensitive or critical;
 - (c) anything else which the Forum decides ought to be considered as such.
- 4.31 Confidential information will be recorded separately by the Clerk and will not be available for inspection by the general public.

Conflicts of Interest

- 4.32 In common with other aspects of working in public life, Forum members should, for reasons of probity, be aware of circumstances in which they should withdraw from meetings. The general principle is that no-one should be involved in a decision where his or her personal interests may conflict with those of the Forum.
- 4.33 Forum members should declare any personal interest as soon as a matter in which they have an interest is raised and withdraw from that meeting. However, Forum members need not withdraw because of an interest that is no greater than that of other members of the Forum, e.g. primary school nominees should not withdraw from discussions on primary school funding.

Proceedings

- 4.34 The proceedings of the Forum shall not be invalidated by:
- (a) any vacancy among their members;
 - (b) any defect in the election or appointment of any members; or
 - (c) any defect in the appointment of the Chair.

5 FUNCTIONS

Consultation with the Schools Forum on the school funding formula

- 5.1 The Council will consult the Forum on:-
- (a) any proposed changes in relation to the factors and criteria that were taken into account, or the methods, principles and rules that have been adopted, in their formula made in accordance with regulations made under section 47 of the School Standards and Framework Act 1998, and
 - (b) the financial effect of any such change.
- 5.2 Consultation under paragraph 5.1 will take place in sufficient time to allow the views expressed to be taken into account in the determination of the relevant authority's formula and in the initial determination of schools' budget shares before the beginning of the financial year.

Consultation on contracts

- 5.3 The Council will, at the meeting prior to the issue of invitations to tender (being at least one month prior to invitations to tender), consult the Forum on the terms of any proposed contract that is paid out or to be paid out of the schools budget for services or supplies to schools, where such a contract is to be let by the Council to a value

equal to or exceeding the local government threshold which applies to that proposed contract pursuant to regulation 5 of the Public Contracts Regulations 2015.

Consultation on financial issues

- 5.4 The Council will consult the Forum annually in respect of functions relating to the schools budget, including:-
- (a) the arrangements to be made for the education of pupils with special educational needs, and in particular:
 - (i) the places to be commissioned by the Council in different schools and other institutions, and
 - (ii) the arrangements for paying top-up funding to schools and other institutions;
 - (b) arrangements for the use of pupil referral units and the education of children otherwise than at school, and in particular:
 - (i) the places to be commissioned by the Council and by schools in pupil referral units and other providers of alternative provision, and
 - (ii) the arrangements for paying top-up funding to pupil referral units and other providers of alternative provision;
 - (c) arrangements for insurance;
 - (d) prospective revisions to the scheme for the financing of schools;
 - (e) administrative arrangements for the allocation of central government grants paid to schools via the Council;
 - (f) arrangements for free school meals; and
 - (g) arrangements for early years provision.
- 5.5 The Council will consult the Forum on such other matters concerning the funding of schools as it sees fit and as required by government regulations.

Reports by the Forum

- 5.6 The Forum will, as soon as reasonably possible and in any event by any date specified by the Council, provide the Council with a report in writing in response to any consultation under this section 5.

Other functions

- 5.7 The Forum may commission and publish reports and research into school funding issues. The Forum may also commission or liaise with working groups on issues related to the function of the Forum.

Provision of account to schools

- 5.8 The Forum will, as soon as reasonably possible, inform the governing bodies of maintained schools of:
- (a) all consultations carried out under this section 5, and
 - (b) any reports provided by the Forum under paragraph 5.7 above.

Consultation

- 5.9 It is a responsibility of the Council to ensure there is consultation with all schools on the following issues:
- (a) changes to the School Funding Formula;
 - (b) changes to the Scheme for Financing Schools.

6 EXPENSES

Forum's Expenses

- 6.1 All expenses of the Forum will be met by the Council and charged to the schools budget.
- 6.2 The Annual Outturn Report will include as part of the overall figure:
 - (a) the costs of servicing the Forum which have been charged to the schools budget for the preceding financial year;
 - (b) the costs of additional work commissioned by the Forum which has been charged to the schools' budget for the preceding financial year.

Members' Expenses

- 6.3 The Council will reimburse the reasonable travel costs of members for attendance at the Forum's meetings, following receipt of a valid claim, at its current mileage rate for attendance at in-service training activities. Such expenses will be charged to the schools budget.

Staffordshire County Council's Schools Forum Membership

1. The Forum will normally have a maximum of thirty two (32) members (subject to paragraph 3.1 of the Constitution):
 - (a) twenty three (23) schools members; and
 - (b) nine (9) non-schools members.
2. Maintained primary, maintained secondary and academies must be broadly proportionately represented on the Forum, having regard to the total number of pupils registered at them. The Council can determine the number of members representing schools in each of the categories set out below. These should be broadly comparable to the pupil numbers in each of these categories.

The Forum's members will include the following:

(a) School Members:

- places for maintained primary schools representatives, where there are any maintained primary schools in Staffordshire, who are either a governor, headteacher or senior member of staff;
- places for maintained secondary schools representatives, where there are any maintained secondary schools in Staffordshire, who are either a governor, headteacher or senior member of staff;
- places for primary and secondary academy representatives, elected from the proprietor bodies of academies within the Council's area;
- one (1) place for a special academy representative, elected from the proprietor bodies of academies within the Council's area;
- one (1) place for a maintained special school representative, where there are any maintained special schools in Staffordshire, who are either a governor, headteacher or senior member of staff;
- one (1) place for a primary schools representative, elected from its membership by the Council's primary schools headteacher forum;
- one (1) place for a secondary schools representative, elected from its membership by the Council's secondary schools headteacher forum;
- one (1) place for a middle schools representative, elected from its membership by the Council's middle schools headteacher forum;
- one (1) place for a nursery school representative, who is either a governor, headteacher or a senior member of staff;
- one (1) place for a maintained pupil referral unit representative, where there are any maintained pupil referral units in Staffordshire, who is either a governor, headteacher or a senior member of staff;

- one (1) place for an academy pupil referral unit representative, elected from the proprietor bodies of academy pupil referral units within the Council's area.

Notes:

1. *Where at least one (1) maintained school exists in any category, at least one schools member must be a representative of that category.*
2. *A "senior member of staff" means an executive headteacher, principal, deputy headteacher, assistant headteacher, business manager or other person responsible for the financial management of the school.*
3. *Governors include interim executive members of an interim executive board.*
4. *Where they exist at least one member must be a representative of the governing bodies of maintained schools and at least one member must be a representative of the headteachers of such schools.*
5. *Proprietor in relation to an academy means the person or body of persons responsible for the management of the academy.*
6. *Middle schools are 'deemed secondary' and are included in the secondary category.*

(b) Non-school Members:

- one (1) place for a member nominated by the Lichfield Diocesan Board of Education;
- one (1) place for a member nominated by the Birmingham Diocesan Schools Commission;
- one (1) place for a parent governor representative nominated by the Council's Prosperous Overview and Scrutiny Committee;
- two (2) places for representatives of the early years PVI sector nominated by the early years sector;
- two (2) places for members nominated by the 16-19 education sector; and
- two (2) places for representatives of the schools consultative groups nominated by the branch secretaries.

The number of places will be published and updated on the Schools Forum website.

Membership Selection, Nomination and Appointment Timetable

The school membership will be reviewed at the beginning of each term (2nd week in September, January and April) to confirm the proportions of maintained and academy school representatives are broadly comparable to the pupil numbers in each of these categories (see Appendix C). Where a vacancy occurs due to paragraphs 3.7 or 3.8 of the Constitution, the Clerk to Schools Forum will notify Entrust to undertake the selection process set out below.

- Once a vacancy arises the Clerk to Schools Forum will notify Entrust to seek applications for school members via a notice to head teachers and chairs of governing bodies requesting that the matter be raised with staff and governing bodies within 2 school working weeks.
- Applications and nominations to be received within a further 2 school working weeks. In those groups where there is more than 1 application an election will be carried out, administered by Entrust on behalf of the Council.
- Membership of nominees to be confirmed by no later than a further 2 school working weeks.
- Where one application per position is received membership will be confirmed by no later than 2 school working weeks.
- Nominations for non-schools members will be sought from the relevant bodies within 1 calendar month of the vacancy occurring.

All members are appointed and attend their first meeting as soon as possible.

Termly Review of Membership

The Schools Forum school membership will be reviewed at the beginning of each term to confirm the proportions of maintained and academy school representatives are broadly comparable to the pupil numbers in each of these categories. This is completed using the process below.

The total number of Schools Forum maintained schools and academy members is 23.

The Schools Forum regulations state that, where there are any, there must be one member for each of the following: maintained nursery schools, maintained special schools, maintained PRUs, special academies and alternative provision academies. This is the case in Staffordshire so there are 5 members from these schools and academies (1 from each type - 5 members). This means that 18 Schools Forum school members represent the mainstream primary and secondary schools and academies.

NoR as at latest Schools Census date - May 2023 and school status as at 01.09.2023

Phase	Maintained - NoR		Academy - NoR		Grand Total	
Primary Phase	22,455	34.2%	43,170	65.8%	65,625	53.8%
Secondary Phase	6,172	10.9%	50,267	89.1%	56,439	46.2%
Grand Total	28,627	23.5%	93,437	76.5%	122,064	100%

Number of primary members is 53.8% of 18 = 9.7

Rounded to the nearest whole number, **10 primary members** are required.

Number of secondary members is 46.2% of 18 = 8.3

Rounded to the nearest whole number, **8 secondary members** are required.

Staffordshire Schools Forum has members from the middle and secondary headteachers forums and one primary member nominated by all schools and academies deemed primary (1 from each -3 members)

Number of maintained primary members is 34.2% of 9 = 3.1

Rounded to the nearest whole number, **3 primary maintained members**

Number of academy primary members is 65.8% of 9 = 5.9

Rounded to the nearest whole number, **6 primary academy members**

Number of maintained secondary members is 10.9% of 6 = 0.7

Rounded to the nearest whole number, **1 secondary maintained members**

(NB there has to be at least 1 maintained secondary school member, where there is at least 1 maintained secondary school)

5 secondary academy members

Based on the calculations above, schools members of Schools Forum are as follows:

10 primary Schools Forum members

- 1 primary school representative (in lieu of primary school headteacher- forum nomination)
- 3 primary maintained school representatives
- 6 primary academy representatives

8 secondary Schools Forum members

- 1 middle school headteacher forum nomination
- 1 secondary school headteacher forum nomination
- 1 secondary maintained school representatives
- 5 secondary academy representatives

[Schools Forums \(England\) Regulations 2012](#)

Schools Forum – 9th November 2023

Notices of Concern

Recommendation

1. Members note the issue and withdrawal of Notice of Concerns to schools.

Report of the Deputy Chief Executive and Director for People:

PART A

Why is it coming here – what decision is required?

2. No decision required.

Reasons for recommendation

3. The agreed protocol for issuing a Notice of Concern includes the provision that information on the issue and withdrawal of a Notice of Concern will be provided to the Schools Forum on a termly basis.

PART B

Background:

4. Since the last Forum, Notices of Concerns have been issued for those schools who finished the 2022/23 financial year in a deficit position and are unable to agree a Licensed Deficit repayment plan. These schools are:
 - Abbot Beyne School, Burton
 - Hob Hill CE/Meth(C) Primary School
 - Moor First School
 - St John's CE(C) Primary School, Swindon
 - Wood Lane Primary School
5. Two new Licensed Deficit agreements have been put into place; these are for:
 - Flash Ley Primary School
 - Fulfen Primary School
6. Notice of Concern have been issued to schools who were unable to set a balanced budget for 2023/24. These schools are:
 - Corbett Primary School
 - Norton Canes High School
 - Talbot First School
7. The Entrust Schools Finance team continue to work with all schools who have existing Notice of Concern or Licensed Deficit agreement and those schools who continue to require support.

Report author:

Author's Name: Melanie Scott, Senior Education Accountant, Entrust Support Services Ltd
Ext. No.: 07921 277815

List of background papers:

Schools Forum 7 December 2016 – Item 6 Notices of Concern: revised protocol
School Forum

School Forum 28th March 2019 – Item 39 Update to the Staffordshire Scheme for
Financing of Schools

Schools Forum – 9th November 2023

Primary Behaviour Support Service

2022 – 2023 Financial Year

Executive Summary:

- To inform Schools Forum of the current Primary Behaviour Support Service offer to Staffordshire maintained primary schools
- To update schools on the recommendations made in the Autumn term 2022 School Forum report and progress made
- To provide further recommendations to support the continued development of the Primary Behaviour Support Service
- To seek agreement of continued de-delegated funding from maintained primary schools' delegated budgets

Recommendation

That Schools Forum:

1. Agrees to the continued de-delegated funding from maintained primary school's delegated budget for 2024-2025 financial year
2. Notes the continued improvements and development of the service over the last year and proposals for next year

Report of Deputy Chief Executive and Director for Families and Communities

Background

1. The Behaviour Support Service for Primary Schools was a centrally retained service until 2012/2013, when it became a de-delegated service under Exception 1 of the Funding Reform requirements. The maintained primary schools have since voted annually to agree that the service should be provided centrally. The service is managed by Entrust Education Services, Staffordshire County Council's joint venture partner.
2. The Primary Behaviour Support Service is available to primary Academies at a cost and can be purchased on a child-by-child basis or as a combined package of Behaviour Support and other services from the Entrust SENIS team.

- The proposed de-delegated funding for this service, maintained primary school's delegated budget for 2024-2025 financial year would be based on the number of maintained schools in Staffordshire.

Context

- Schools send their referrals for primary behaviour support to a central inbox, behaviour@entrust-ed.co.uk. Every Tuesday referrals are systematically reviewed and allocated to a consultant based on the nature of the concern and specialist knowledge of the practitioner as well as geographical location.
- During the academic year 2022-2023 the number of primary Behaviour Support requests from maintained schools increased, even though the number of maintained schools reduced.
- Figure 1 - Behaviour Support referrals from maintained Primary Schools.

Academic Year	Behaviour Support referrals	Average number of referrals per maintained Primary school
2012 - 2013	416	1.4
2013 - 2014	444	1.6
2014 - 2015	362	1.4
2015 - 2016	382	1.6
2016 - 2017	369	1.8
2017 - 2018	209	1.2
2018 - 2019	129	0.9
2019 - 2020	163	1.2
2020 - 2021	199	1.6
2021 - 2022	141	1.25
2022 - 2023	171	1.5

The table below shows the following:

A = accumulative total for the period 05/09/2022 to 25/07/23 (academic year 2022/23)

B = accumulative total for the period 03/04/2023 to 25/07/23 (part of the SDA contract year 2023/24)

Year	CC	LF	ES	TW	SB	SS	NW	SM	A	B
N	1	0	0	0	0	0	0	0	1	0
R	16	3	3	1	12	5	2	2	44	9

1	10	3	4	3	7	5	6	9	47	9
2	3	2	2	0	8	1	3	1	20	4
3	6	2	3	0	7	3	3	2	26	5
4	2	1	1	0	6	1	2	0	13	4
5	3	0	1	0	3	2	3	0	12	5
6	3	0	0	0	0	2	2	1	8	0
Total	44	11	14	4	43	19	21	15	171	36

171 referrals were made across 74 schools for Primary Behaviour Support in 2022/23. The service continues to receive higher numbers of referrals for pupils from reception and year 1. 53% of total referrals were received for children in these year groups in 2022/23, which is comparable to the figures reported in 2021/23. Further data analysis is scheduled to unpick some of the root causes for why there is such a high referral rate for these year groups. For example, were the children referred for support previously known to the Early Years Forum and did they attend an Early Years setting or not.

Total number of referrals for each district for the period 05/09/2022 to 25/07/23 (academic year 2022/23)

District	CC	LF	ES	TW	SB	SS	NW	SM	Total
Total	44	11	14	4	43	19	21	15	171
Maintained Schools	15	16	10	7	18	15	15	11	107

Total number of referrals for each district for the period 03/04/2023 to 25/07/23 (SDA contract year 2023/24)

District	CC	LF	ES	TW	SB	SS	NW	SM	Total
Total	12	2	4	1	7	4	2	4	36

For the second successive academic year, Cannock Chase has the highest referral rate for Primary Behaviour Support in the county. We have also seen an increase in referrals being made by primary schools based in Stafford. 25% of PBS referrals were received from schools in the Stafford borough in 2022/23 compared to 15% of referrals in 2021/22

Figure 2 – Proportion of Maintained and Academy Primary Schools by academic year.

Academic Year	Number of Academies in Staffs	Number of maintained schools in Staffs
2012 - 2013	13	301
2013 - 2014	29	285
2014 - 2015	45	269
2015 - 2016	75	239
2016 - 2017	101	213
2017 - 2018	132	182
2018 - 2019	162	152
2019 - 2020	177	135
2020 - 2021	185	127
2021 - 2022	195	117
2022 - 2023	207	107

Update from last report to School Forum

7. Our core support offer to schools is focused on effectively implementing a graduated response. The visit begins with a classroom observation which records the pupils' behaviour at minute intervals during a lesson. This is followed by a discussion with the class teacher and the completion of a Boxall profile. The interpretation of the Boxall profile gives a comprehensive picture of the behaviour of the child and identifies some of the reasons behind this. During this discussion, some recommendations are given to the class teacher. After the visit all the gathered information is disseminated into a comprehensive report which describes and explains the behaviour as well as providing strategies for the school to implement.
8. Following the first visit and report a follow up visit is frequently conducted with the school to support the school in writing a Pastoral Support Plan (PSP). Having this plan in place helps the school effectively support the pupil. At this point parent/carers are usually involved when the practitioner will meet with parent/carers and the school to discuss and plan how to meet the pupils needs.
9. We are also able to provide 1 to 1 support to model strategies and approaches for staff. As a service we are also able to provide alternative support depending on the needs of the pupil and school/staff, for example

a programme of individual intervention to address SEMH difficulties such as anger management, bereavement, social interaction.

Impact of the Primary Behaviour Support Service

10. Permanent Exclusions from primary maintained schools 2022 – 2023, - pupils known to the Primary Behaviour Support service.

Of the thirteen pupils from maintained schools who were permanently excluded during the academic year 2022 – 2023, seven had been referred into the Behaviour Support service, equating to 4% of the total number of referrals received to the service that year.

Two pupils out of the thirteen had been seen previously in 2021, the schools were offered further support but did not take up the offer. The remaining five pupils were not known to the service.

96% of the total number of pupil referrals received to the service in 2022-23 remained in their school placement and were not permanently excluded.

From September 2023, Staffordshire County Council will be sharing suspension data with the service so that maintained schools can be contacted and offered advice and support if required.

11. Based on the service's experience of working with schools, feedback received, and three recommendations (included below), we have implemented some additional delivery from Autumn 2022. These additional functions provide schools with further support and advice on implementing the graduated response.

12. **Recommendation 1: to extend the roll out of behaviour clinics** *to provide us with the ability to reach and impact on more pupils. Schools will be able to book a visit with a consultant who can meet individually with numerous members of school staff and provide strategies and recommendations for pupils with SEMH needs.*

This year has seen an increase in the demand for whole class and whole school support. The team have been into nine schools to deliver behaviour clinics offering advice and guidance on strategies and signposting, and recommendations to staff. Feedback from all nine schools was extremely positive, staff found the professional discussions provided, practical suggestions and new approaches to managing challenging behaviour in the classroom invaluable.

There was one permanent exclusion during 2022/23 within the cohort of 9 schools that held behaviour clinics in the academic year.

Actions completed with 9 schools:

- Behaviour policy reviewed
- Staff training to ensure consistency of language and positive behaviour management throughout school
- Implementation of positive behaviour management strategies within class/es

Staff within these settings have fed back that they feel more confident in dealing with difficult behaviours following the enhanced training received.

13. **Recommendation 2: to target and provide support to Early Career Teachers (ECT's) and their mentors within Staffordshire.** *We would engage with schools to work with them to support their ECT's with implementing school behaviour policies and practice.*

Information was sent out to all ECTs, tutors and HTs offering support with behaviour management. The Primary Behaviour Support Service will be providing extra support to 3 ECT's this half-term. Where the team observe lessons delivered by ECT's, they provide recommendations following each visit and additional support is available on request. This will continue to be promoted up until March 2024.

14. **Recommendation 3: to develop and expand our offer to schools to provide whole school LEGO training as an adapted teaching method.** *Using LEGO or Duplo encourages children to express their thoughts and ideas and feelings symbolically. The method ensures a secure and non-judgemental process for solving problems, expressing personal feelings, and breaking down barriers that can affect achievement in curriculum-based topics for the future. Using this 3D external material can increase cognitive skills, concentration, problem solving and flexible thinking. It can be used in a collaborative way, sharing, negotiating, and building empathy. Adults can model new language, name feelings and emotions equipping children with lifelong skills. Teaching resilience by being confident and self-assured in this 'no model is ever wrong' approach.*

We delivered 5 Lego training sessions in 5 schools, had input into Entrust's SENDCo update and delivered CPD on Lego to the SENIS team,

which colleagues have used to discuss how this approach can be used with staff in schools.

Feedback from schools

- *How the practical activities displayed their impact to us, we shared thoughts and feelings and discovered new things about each other, how wonderful this is going to be to give children this opportunity*
- *Really enjoyed every minute and seeing how this could work in our school*
- *Gave me an insight into other people’s minds through LEGO*
- *I learned new skills to help children express themselves*
- *Immediately useable...brilliant training*
- *It left me with lots of things to think about, now feel more aware*
- *We all ended up learning more than we expected*

Schools have given positive verbal feedback, using the method with individuals to support their pastoral input. We will be revisiting these settings to gather impact data as to how they have continued to use these approaches to support their pupils and the impact it has had on pupils.

Further training has also been delivered to schools as outlined below:

Training delivered	Number of sessions
Attachment and Trauma	1
Autism	3
Behaviour management & De-Escalation	12
Boxall Profiles	1
Lego	5
Lunchtime Supervisors	3
Nurture	3
Whole School Support	9

15. **Recommendation 4: To expand the roll out of behaviour audits for schools.** *We will continue to work with the Commissioner to identify schools who would potentially benefit from undertaking a behaviour audit. For example, schools where there are high numbers of fixed term*

exclusions. We will report on and cascade to school's aspects of good practice observed.

During The Autumn term 2022, two schools received a Behaviour Audit. Good practice observed included:

- Clear routines and expectations
- A rich, diverse approach to the curriculum
- High levels of praise and encouragement
- Support provided for all pupils with extra support for some as appropriate to their needs
- A positive culture where pupils are confident to speak to adults
- All pupils were respectful while other pupils spoke, they were supportive of one another
- Flexibility in the approach to meet individual needs of pupils.
- Parents are kept well informed

Recommendations included:

- Consistency of language by staff in relation to behaviour
- Make sure display boards in relation to behaviour are clearly visible
- Clarity required around some of the wording of the Behaviour Policy
- Use of a consistent and positive reward system throughout the school by all staff, so that the focus is on rewards and not sanctions
- If a restorative conversation is going to be used as an approach, ensure staff are trained to use this appropriately and consistently
- Ensure that all areas of the school are monitored by school staff during breaktimes and lunchtimes

Due to the increase demand and focus on casework, it was agreed with the Commissioner that this would be revisited during the Autumn term 2023.

SENIS survey

16. We survey schools at the end of each visit via a questionnaire. 209 school visits were delivered and 100% of respondents rated the service good or excellent. Questions also asked included:

- Is there any way in which the visit could have been improved?
98% responded no it could not have been improved in any way.
- Has the service you received enabled you to identify and implement improvements in practice to support children?
100% responded yes, the support had enabled them to make improvements.

17. The feedback above reflects on the service in the academic year 2022 – 23. We have used a range of methods to promote the service and ensure that schools are aware of what is available to them free at point of delivery. This has included updates in the Entrust SENIS e-news, information going into the school bag and the Entrust website and our social media channels and attendance at the SEND and Inclusion Hubs where capacity allows.
18. During the academic year 2022- 23 we attended 41 SEND and Inclusion Hubs where we were able to contribute to discussions of individual pupils, if they were known to the service, and offer advice, guidance, signposting, and initiate pupil referrals.

Feedback from schools

19. Below are examples of feedback on service delivery received from schools during 2022-2023 academic year:

'The team are very knowledgeable and always have time to discuss pupils with staff for the very best outcomes for our pupils. We take on their recommendations and engage with families'.

Primary school in the Cannock Chase District.

'The training was inspirational and very motivating and has absolutely given us so much knowledge and drive to start up our nurture group. The ideas will and strategies will help to develop our policies'.

Primary school in the East Staffordshire District.

'I was delighted with the knowledgeable support we have received from the team. I had put off contacting the Behaviour Support Team, worried they would not support us, I couldn't have been more wrong'.

Primary school in the South Staffordshire District.

Case Studies:

20. Case study example

From a referral for a child last year, the Behaviour Support team held a consultation with the SENCo about their individual needs. Alongside this, a new headteacher had been appointed and wanted to review the approach for certain pupils who were struggling to access their educational opportunities in a positive manner.

To empower staff, the school asked the Behaviour Support team to come in and review the current EYFS cohort as they were transitioning into Year One. As a result of the consultation, the Head wanted to proceed with setting up nurture group/provision. The team provided whole staff training on Nurture provision and supported the school in implementing their plans.

Feedback from the Headteacher

'Can I firstly say thank you for the training you recently provided for the staff, those that attended were inspired by both you and what you had to say. It has really helped our thinking toward next year. Looking ahead at next year, we would really like to aim to put into practise some of what you talked about during the training – in particular the support for nurture and the behaviour plans. I wonder if we would be able to access your support in doing this right. I would really appreciate a conversation with you at some point about ideas I have that would really benefit from your input'.

Through emails and telephone support from the Behaviour Support team, including virtual support for new staff that had joined, the school is implementing new strategies from September. The team also reviewed their draft behaviour policy, with suggestions in line with DfE recommendations.

The team is continuing to support the school in September to ensure the smooth running of the intervention and the effective use of Boxall profiles for identifying, tracking, and setting targets.

Operation and efficiency of the service

21. The efficient referral system ensures visits/consultation are arranged quickly and contact is made with the school within 24 hours following the referral meeting. Delivery is face to face or virtual dependent on the schools wishes. Schools appreciate having a professional conversation with practitioners who understand behaviour issues and can confirm the effectiveness of the strategies they are already using and also suggest additional approaches.
22. As part of a wider SENIS team the service can also draw on additional expertise from MEAS where appropriate to support with particular cases. During this academic year, several joint visits between the Behaviour Support Service and the Minority Ethnic Achievement Service (MEAS) have been made. These have supported schools in understanding what is causing the issues for the pupil and appropriate advice and guidance has been given to ensure behaviour and language needs are met.
23. The Behaviour support helpline is available every Tuesday and Thursday afternoon during term time on 0333 300 1900 option 6 ask for Behaviour Support. This phone line is open to all schools, both maintained and academies. We support schools with enquiries ranging from requests for training, advice on transition, support for pupils who are exhibiting aggressive behaviour in the classroom and general requests for advice and guidance on anything relating to behaviour. From December 2022 to

July 2023, on average we received 10 - 12 calls a week seeking advice and support from a SEMH specialist. Staff also receive calls to their work mobiles on a daily basis. Examples of the type of support/advise requested within a sample week were as follows:

- Transition issues with a reception child
- Physical violence towards other pupils
- New child, who was showing signs of refusal and disengagement
- Violence towards staff
- ASC advice for a KS1 pupil
- Concerns for pupil in Reception

This information is shared with Commissioners at the monthly reporting meeting and trends highlighted to the SEND & Inclusion Hubs.

24. We continue to produce a termly newsletter for schools which includes advice, guidance, resources, and relevant articles including thought leadership. This is also sent to the SEND and Inclusion Hubs to promote the service.

[Entrust Behaviour Health and Wellbeing Team | Staffordshire Connects](#)

Recommendations for the financial year 2023/24 in additional to core delivery;

25. **Recommendation 1: to offer schools which meet criteria (to be determined with the Commissioner) a behaviour clinic** to provide us with the ability to reach and impact on more pupils. Schools will be able to meet with a consultant who can talk individually with numerous members of school staff and provide strategies and recommendations for pupils with SEMH needs.
26. **Recommendation 4: To continue expand the roll out of behaviour audits for schools.** We will continue to work with the Commissioner to identify schools who would potentially benefit from undertaking a behaviour audit. For example, schools where there are high numbers of fixed term exclusions. We will report on and cascade to schools aspects of good practice observed.

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Ext. No:
Room No: Staffordshire Place 1, Floor 1

In conjunction with: Kate Brown, Head of Service for SEND and School Improvement Services

Ext. No: 0333 300 1900

Room No: Entrust Education Services

List of background papers:

DRAFT

Schools Forum – November 2023
Minority Ethnic Achievement Service (MEAS)
2022 – 2023 Financial Year

Executive Summary:

- To inform the Schools Forum on the delivery of the current Minority Ethnic Achievement Service (MEAS) offer to maintained schools
- To update schools on the recommendations made in the Autumn term 2022 School Forum report and progress made in delivering them
- To provide further recommendations to support the continued development of MEAS

Recommendation

That Schools Forum:

1. Agrees to the continued de-delegated funding from maintained primary school's delegated budget for 2024-2025 financial year
2. Notes the continued improvements and development of the service over the last year and proposals for next year

Report of Deputy Chief Executive and Director for Families and Communities

Background

1. The Minority Ethnic Achievement Service was a centrally retained service until 2012/2013, when it became a de-delegated service under Exception 1 of the Funding Reform requirements. The Schools Forum have since voted annually to agree that the service should be provided centrally. The service is managed by Entrust Education Services, Staffordshire County Council's joint venture partner.
2. The Minority Ethnic Achievement Service is available to primary and secondary academies at a cost and can be purchased on a pupil-by-pupil basis or as a combined package of Inclusion Support and other services.
3. The proposed de-delegated funding for this service, maintained primary school's delegated budget for 2024-2025 financial year would be based on the number of maintained schools in Staffordshire.

Context

4. Maintained schools are divided into two categories to determine the support they receive from MEAS.
 - EMAG (Ethnic Minority Achievement Grant) schools are identified annually based on a formula which considers the number of EAL pupils and also their country of origin. EMAG schools receive funding directly and are not entitled to support for new arrivals from MEAS. We have produced a good practice guide to support schools; [Minority Ethnic Achievement Service \(MEAS\) | Staffordshire Connects](#)
 - There are currently 30 Staffordshire schools eligible for EMAG funding.
 - Non EMAG schools can refer new arrivals to MEAS and also receive a nominal funding allowance for each pupil, this is used to fund additional resources such as dictionaries, dual language books or apps.
5. All maintained schools who do not receive the EMAG funding are able to request support for pupils causing concern, i.e., those who are not making the expected progress in learning English.
6. All referrals for the Minority Ethnic Achievement Service are sent to a central inbox MEAS@entrust-ed.co.uk. Referrals are systematically reviewed daily and allocated to a caseworker based on the language spoken by the pupil.
7. Once pupils are allocated a consultant, the consultant will arrange a visit to the school. During this visit, the pupil will be observed in class and an assessment will usually be conducted. The nature of this assessment depends on the age of the pupil and the language spoken. Where the consultant worker speaks the pupil's language a home language assessment will be conducted. During the visit there will be a conversation with an appropriate member of school staff to identify any particular issues for the pupil and where possible with the parent/carer. Following the visit, a comprehensive report is sent to the school which includes strategies and resources which can be used to support the pupil.
8. In addition to the initial visit MEAS will also attend meetings with parents, this is particularly useful where the team member speaks the home language but can also be useful in other situations. For example, many parents do not understand the benefits of the child talking their own language at home or how the English education system works. The team's experience of working with EAL pupils can help to overcome these issues.

9. Figure 1 – Referrals from Maintained Schools

Academic Year	New Arrivals Primary	New Arrivals Secondary	Pupils causing concern Primary	Pupils causing concern Secondary
2015 - 2016	161	21	28	0
2016 - 2017	80	17	36	4
2017 - 2018	47	6	29	3
2018 - 2019	26	13	20	2
2019 - 2020	32	5	16	3
2020 - 2021	15	0	24	2
2021 - 2022	54	7	17	1
2022 - 2023	52	6	11	0

41 Maintained Schools made referrals for MEAS support during the academic year 2022/23.

The table below shows the following for each district;

A = accumulative total for the period 05/09/2022 to 25/07/23 (academic year 2022/23)

B = accumulative total for the period 03/04/2023 to 25/07/23 (part of the SDA contract year 2023/24)

Year	CC	LF	ES	TW	SB	SS	NW	SM	A	B
N	1		1				1		3	0
R	3	1	1	1	3		3	3	15	3
1	1		1				1	1	4	
2	4	4	1			1	3	1	14	1
3	1		2		3			1	7	1
4	2	1	3		1			2	9	
5	2	1	3		1				7	1
6	1	2			2			1	6	
7		1							1	
8										
9										
10		3							3	
11										
Total	15	13	12	1	10	1	8	9	69	6

Figure 2 – Comparison of Academy and Maintained Schools

Primary Schools				
Academic Year	Academies		Maintained	
	Schools	%	Schools	%
2015 - 2016	73	24.4%	226	75.6%
2016 - 2017	97	32.4%	202	67.6%
2017 - 2018	122	40.8%	177	59.2%
2018 - 2019	148	49.7%	150	50.4%
2019 - 2020	177	56.2%	135	43.8%
2020 - 2021	183	58.6%	129	41.4%
2021 - 2022	195	63.3%	113	36.7%
2022 - 2023	207	65.9%	107	34.1%
Secondary Schools				
2015 - 2016	36	51.4%	34	48.6%
2016 - 2017	42	60.0%	28	40.0%
2017 - 2018	47	67.1%	23	32.9%
2018 - 2019	53	74.6%	18	25.4%
2019 - 2020	55	78.5%	15	21.5%
2020 - 2021	58	82.8%	12	17.2%
2021 - 2022	67	83.6%	13	17.2%
2022 - 2023	70	85.9%	11	14.1%

Countries of origin for arrivals into Staffordshire schools during the academic year 2022 - 2023

Country	Number
Afghanistan	3
Gambia	2
Ghana	1
Hong Kong	6
India	14
Namibia	1
Poland	4
Romania	3
Russia	1
Slovakia	1
Turkey	2
Ukraine	29
Zimbabwe	2
Total for maintained schools	69

10. Beyond the individual consultant support, schools are also supported to develop their provision for EAL learners through a range of approaches including learning walks, modelling good practice for staff and resources such as guidance for welcoming refugees.

Update from last report to School Forum

11. Working with families from Ukraine – a number of Ukrainian families arrived in Staffordshire throughout the academic year 2022 -2023 and the MEAS team supported schools as they welcomed these new arrivals. In all 29 referrals were made from maintained schools and 24 referrals from academies. Schools were provided with support and the team have worked with 53 pupils since September 2022. As a result of the support, Ukrainian children settled into schools more quickly and school staff reported an increased confidence in meeting their needs.

Some of the common challenges faced by pupils and schools were:

- a. New environment – different school systems and curriculum
- b. Learning EAL in a fully English-speaking environment – as opposed to language classes
- c. Different teaching styles - UK schools vs Ukrainian schools
- d. Culture – dress, food, behaviour norms
- e. Social expectations
- f. Preparing mid-term to receive the pupils
- g. Sorting logistics such as access arrangements/uniforms/resources/contacts
- h. Non-attendance after enrolment
- i. Potentially non-permanence of the pupils' enrolment in the school
- j. Staff being unfamiliar in supporting new arrivals

Support provided by MEAS for receiving schools;

- a. Regular contact with the schools, continuing to offer support dependant on the schools needs. For example, to provide resource and lesson plan guidance and curriculum progression.
- b. Delivery of staff sessions in how to welcome and work with newly arrived pupils, how school and pupils can support the EAL pupils. For example, supporting staff to reflect on the school's difference and diversity curriculum.
- c. Signposting both via email and during staff sessions to useful resources and websites.
- d. Visits to schools to observe, assess and advise staff on how best to support the children.
- e. Reports were written and sent in with recommendations of strategies which included, placing the newly arrived pupils with middle to high ability pupils, to include children in all activities, use visuals where possible when teaching the children as well as pre-teach vocabulary on new topics, to use visuals to communicate their social needs, use of buddy systems etc.
- f. Delivery of diversity sessions around Migration, Islam, and Christianity.

Difference and Diversity feedback:

- Very interesting content and sessions well delivered
- Children highly engaged and provoked good questioning
- Just the right amount of content for the session length

- Older children could relate to the session by recalling previous learning
- Excellent behaviour management and good quality resources

Feedback from schools:

- *'It has enabled me to put in place suitable and supportive activities for the student which they access independently'*
- *'The team have shown me ways to prepare the classroom prior to the start of the lesson as well as ways to adapt lessons'*
- *'Explained the importance of using the child's home language (note taking / writing) which has made me look at understanding the child's individual needs in a much better way'*

Impact of the MEAS service

12. Based on the service's experience of working with schools, feedback received, and the three recommendations made in the 2022 Schools Forum report, (detailed below) we have implemented some additional delivery from September 2022. These additional functions have provided schools with further support and advice on implementing the graduated response.

13. **Recommendation 1: To continue to promote and provide a MEAS telephone helpline** for 1 session per week, to help improve accessibility to the service for all schools. This will be monitored, and sessions added should there be sufficient demand.

Most enquiries come into the MEAS inbox and are dealt with on a daily basis; however, the phone line continues to receive 2 – 3 calls a week from schools seeking advice and support from an EAL specialist. Examples of the type of support/advice requested within a sample week were as follows:

- Provided strategies and resource links for 2 Ukrainian pupils due to start in school
- Provided advice on initial support for New Arrival in Reception
- Provided advice for transition and resources
- Provided advice on working with parents
- Signposted to resources

14. **Recommendation 2: To produce training for schools** around ways to promote oracy and opportunities to talk for EAL learners. This will consist of whole school, classroom, and homework strategies.

Due to the high number numbers of pupils needing support in schools, this recommendation is being followed up during Autumn term 2023. The team have produced three training sessions:

- a. Supporting EAL children
- b. Supporting the Development of Vocabulary in EAL Learners
- c. EAL and SEND

These will be recorded as webinars and uploaded to our website and marketed to schools via our newsletter.

15. Recommendation 3: Continue to provide MEAS support to pupils from Ukraine *Provide information, advice, and guidance to schools around supporting pupils from Ukraine as part of the services core offer and as required and directed by Staffordshire County Council, including providing a termly training webinar for schools.*

As detailed in paragraph 11 support was provided for schools, and the team have worked with 53 pupils since September 2022.

16. An example of MEAS delivery

Prior to the visit, through conversation with the SENCo in school, the team were aware of the main issues and concerns for staff regarding the two pupils (twin siblings) who had been referred to the service. The pupils were new to the country and had limited experience of schooling in their home country and no experience of speaking English.

The initial visit began with a brief discussion with the SENCo around the sorts of interventions/ strategies already in place and their effectiveness. The assessment process was explained and what the school could expect from the team's involvement.

An observation followed of the children in their class. During the observation, which usually lasts between 30-45 minutes, the team are observing the following;

- communication with peers and adults
- whether the children are settled and know or can follow routines with ease
- in what format they are given instructions and how they follow them
- can they access what they need within the classroom?
- are they able to make their basic needs known?
- what materials or strategies are being used to support their understanding of the curriculum?

After the observation, the children were assessed individually. Assessments focused on;

- their understanding of basic vocabulary, and spoken English
- their spoken English
- their understanding of the conventions of written text and their ability to read English script and basic comprehension
- their ability to reproduce letters, write their name and complete a simple sentence
- their phonological knowledge
- basic number knowledge

The team then met with the class teacher and talked through any findings from the assessment and observation. Advice is provided so that strategies can be put in place immediately, for example the use of visuals to support understanding, the use of desk prompts- letter and word mats. Strategies were also provided for the acquisition of vocabulary and how they could be integrated into their lessons. 'The silent period' that many EAL pupil experience was explained and why this happens and the importance of their home language continuing to be spoken at home and celebrated in school. It is also important to offer reassurance about what practice/strategies are currently working well.

The team always feedback to whoever makes the initial referral, and briefly outline what has been discussed with the class teacher and that the report will contain observations and assessment results, along with other strategies and signposting to websites and resources that will support the pupils.

Following the team's intervention, the SENCo, who made the initial referral, fed back:

"This was a really useful intervention to inform future support for the children, as well as giving the staff confidence to support the family".

The two pupils continued to make progress and access the curriculum as staff implemented the strategies and recommendations made.

17. Additional delivery

Contact was made with the 30 EMAG schools requesting data on newly arrived pupils, learning through English as an additional language in Staffordshire.

The letter explains that as an EMAG school there is no longer the need to complete a Notification of New Arrival form (NONA) and a funding form for each new arrival. EMAG schools will receive a lump sum for the year, comprising a minimum allocation of £1500. This is a "one off" payment to meet the specific needs on entry to school.

At the end of the year each school will be asked to submit information on the number of new arrivals they have received.

EMAG schools are still eligible to apply for additional funding to meet the needs of asylum seeking/refugee children and the school can access support from MEAS if they have an EAL pupil who is causing concern. This may be a new arrival or a pupil who has been in school for some time.

EMAG schools were requested to submit their action plans for analysis detailing how they were utilising their EMAG funding. To date 29 schools have returned their action plans from a possible 30 schools which is a 97% return rate. Reminders have been sent to the remaining school. The team have put together a Good Practice guide and action plan template which was sent to the schools to showcase excellent practice and provide further ideas for schools.

18. The team continue to support schools with Difference and Diversity sessions. Of the ten sessions delivered in four schools the following feedback was received:

- *Very interesting content well delivered.*
- *Children highly engaged and provoked good questioning.*
- *Just the right amount of content for session length.*
- *Older children could relate to the session by recalling previous learning.*
- *Excellent behaviour management and good quality resources*

Due to the increase demand and focus on casework, it was agreed with the Commissioner that this would be revisited during the Autumn term 2023.

19. The team produced 10 top tips for transition for schools which was included in the summer 2023 edition of the termly newsletter for schools. [Minority Ethnic Achievement Service \(MEAS\) | Staffordshire Connects](#)
20. Production of a termly newsletter for schools which includes advice, guidance and resources and relevant articles and thought pieces. [Minority Ethnic Achievement Service \(MEAS\) | Staffordshire Connects](#) We have sent copies of these to the SEND and Inclusion Hubs in order to reach a wider audience and promote the service.
21. Attendance at the SEND and Inclusion Hubs – this has enabled the team to bring MEAS to the attention of schools and other multi-agencies, e.g. Inclusion officers, schools who have not accessed MEAS historically and has led to more enquiries.

Recommendations for the financial year 2023/24 in additional to core delivery;

22. **Recommendation 1: To continue to promote and provide a MEAS telephone helpline** for 1 session per week, to help improve accessibility to the service for all schools. This will be monitored, and sessions added should there be sufficient demand.
23. **Recommendation 2: To produce training for schools.**
- (1) The Role of Governors in Supporting EAL children
 - (2) Welcoming EAL Families into the School Community – Supporting Inclusion

Decisions

The Schools Forum:

24. Agree to the continued de-delegated funding from maintained primary school's delegated budget for 2024-2025 financial year
25. Notes the continued improvements and development of the service over the last year and proposals for next year

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In conjunction with: Kate Brown, Head of Service for SEND and School Improvement Services

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Room No: Entrust Education Services

List of background papers:

DRAFT

Schools Forum – 9 November 2023

School Budget 2024-25: De-delegation, Central Expenditure & Education Functions

Executive Summary

- This report asks for approval from Schools Forum for the Local Authority (LA) to retain DSG funding to deliver services on behalf of schools and Early Years.
- The budget areas proposed for de-delegation for 2024-25 are the same as those in previous years.
- Funding for Historic Commitments has been reduced by a further 20% from 2023/24
- As in previous years, the LA is proposing to use growth funding to help fund the National Funding Formula and make payments as per the growth fund policy. Any underspend will contribute towards repayment of the DSG deficit as per the Deficit Management Plan
- The LA is asking for £2.2m of Early Years funding to be retained centrally.
- The LA will consult with Schools Forum in January 2024 on a new 2 year old and under rate formula for 24/25 and beyond.
- The LA is asking for approval of a provisional levy of £57.87 per pupil from maintained schools to fund Education Functions previously funded by the Education Services Grant.

Recommendations

1. That the Schools Forum members from maintained schools only, vote on each de-delegated budget heading on behalf of the schools they represent.
2. That the Schools Forum approve the indicative allocations for both historic commitments and ongoing functions within the Central School Services Block be retained centrally for this purpose.
3. That the Schools Forum approve the continued use of the formula driven Growth Funding allocation.
4. That the Schools Forum approve £2.2m of Early Years funding to be retained centrally.

5. That the Schools Forum members from maintained schools only, approve a levy per pupil in 2024-25 to fund statutory duties performed by the Local Authority and previously funded by the Education Services Grant.

Report of the County Treasurer

PART A

Why is it coming here – what decision is required?

6. The Schools Forum has oversight of the Schools Budget and is required by the Finance Regulations to annually approve central expenditure (ongoing and historic commitments)
7. Maintained school members only are required annually to:
 - Vote on each de-delegated budget heading by phase
 - Approve a levy per pupil to fund duties performed by the Local Authority and previously funded by the ESG general duties rate.
8. If the Local Authority and Schools Forum are unable to reach consensus on the amount to be retained by the Local Authority for services previously funded by the ESG general duties rate, the matter will need to be referred to the Secretary of State.

PART B

Background

9. For 2024-25 DSG allocations to Local Authorities will again be made using the National Funding Formula. The DfE recently republished provisional NFF allocations due to an error in the initial calculations. Funding rates used within the NFF have reduced by approximately 1%. At this stage in the year individual schools have not received their budgets for 2024/25 which are subject to local school forum decisions taken today and census data published in December. The lowest permissible Minimum Funding Guarantee (MFG) remains at 0% and schools continue to be advised by Entrust to use this in their budget planning.
10. Final DSG allocations will not be known until December, and Local Authorities need to submit school budgets to the ESFA by 22 January. This timescale means decisions on the budget areas in this report need to be

made at this time to enable schools and services time to plan for their budgets and responsibilities for 2024-25.

De-delegation

11. Under the national funding arrangements, the government wants schools to have the opportunity to have as much funding and responsibility delegated to them as possible. Each year the Schools Forum representatives for maintained primary and secondary schools are required to vote on behalf of the schools they represent to determine whether or not a range of costs currently met centrally will transfer to maintained schools for them to manage themselves. The budget for these costs would also transfer to schools on a formula basis.
12. The maintained schools' members vote by phase on any areas proposed for de-delegation by the local authority and the outcome of that vote is binding for all maintained schools within the phase.
13. Academies are not part of these arrangements since these responsibilities and the funding for them are automatically delegated to academies through the ESFA use of the local funding formula.
14. The budget areas de-delegated last year following the equivalent vote are set out in the table below. Insurances are now provided by the DfE's Risk Protection Arrangement (RPA). Budget values are estimated for all primary and secondary schools (i.e. including academies) to provide the context of values involved. Actual figures for 2024-25 will be finalised over the next few months as the settlement and school census become available.
15. The staff costs for union duties budget (pooled facilities time funding) is detailed further in a separate paper on the agenda.
16. Supplementary information on the impact of delegation of each area is included in Appendix 1. The authority proposes that these areas are subject to the de-delegated vote for 2024-25.

Areas proposed for de-delegation for 2024-25:

Budget Area	Primary £m	Secondary (including middle) £m
Insurances (mainly premises related provided by RPA)	1.454	1.165
Staff costs (Maternity Pay)	1.294	1.190
Staff costs (Union Duties)	0.157	0.071
School Specific Contingency	0.391	0.195
Support for ethnic minority pupils or under-achieving groups	1.014	0.366
Licences and Subscriptions	0.593	0.285
Behaviour Support Services	0.610	Delegated
FSM eligibility	0.064	0.033

Do maintained Forum members agree for these budget areas to be de-delegated for 2024-25?

Central School Services Block

17. There are some areas of central expenditure which need to be considered by the Schools Forum.
18. Funding in the Central School Services Block is split into Historic Commitments and Ongoing Functions.

Historic Commitments

19. For historic commitments the following rules apply:
 - a. The budget cannot exceed the value agreed in the previous funding period
 - b. The expenditure against these budgets must be as a result of arrangements that already existed before 1 April 2013
 - c. The Schools Forum must approve the amount of the budget set for each heading
20. Historic commitments funding has again been reduced by 20% compared to 2023-24. The expected allocation for historic commitments for Staffordshire for 2024-25 is £1.045m

21. The only heading under which Staffordshire retains funding for historic commitments is prudential borrowing. The indicative budget for 2024-25 is £924,130. Any remaining historic commitment funding will contribute towards the DSG deficit.
22. School Forum approval is also required for the SEN transport budget of £250,140. This is now funded from the High Needs Block.

Does the Schools Forum approve the use of the Historic Commitments funding and the SEN Transport budget as set out above?

Ongoing Functions

23. Ongoing Education Functions are funded by a combination of council tax and DSG. There is an annual liability for Teachers Pensions Added Years of c.£8.1m which is funded by council tax.
24. The estimated cost for other ongoing education functions for 2024-25 is £4.1m. These functions are funded by DSG through the Central Schools Services Block (CSSB). Any underspend on the CSSB will be used to contribute towards the DSG deficit.
25. These functions are provided to all schools and are listed in the table in Appendix 2.

Do Schools Forum members approve the ongoing functions allocation in the Central Schools Services Block be used to fund these services?

Growth and Falling Rolls Funding

26. Included within the Schools Block allocation is an amount for growth funding, which since 2019-20 has been formula driven. The formula allocates growth funding based on the differences between the primary and secondary numbers on roll in Middle Super Output Areas (MSOA) in the local authority between the October 2022 and October 2023 school censuses. This will fluctuate from year to year and is difficult to estimate.
27. Latest estimates of number on roll indicate the growth funding allocation for 2024-25 will be around £3.3m. The actual allocation will not be announced until December.

28. As in previous years it is proposed that the growth funding allocation is used to fund pupil growth in the National Funding Formula (approx. £1.3m in 2023-24), and allocations as per the Growth Fund policy (approx. £1m). Any underspend in growth funding will be used to contribute towards repayment of the DSG deficit as detailed in the Deficit Management Plan.
29. For the first time in 2024-25 the government is introducing funding for falling rolls. Funding will be allocated to Local Authorities where numbers on roll in Middle Super Output Areas (MSOA) have fallen by more than 10% between the October 22 and October 23 censuses.
30. Latest estimates of numbers on roll in Staffordshire indicate that we do not have any areas where numbers on roll are falling by 10% and therefore, we do not expect to receive any falling rolls funding for 2024/25.

Does the Schools Forum approve the continuing use of the Growth Funding allocation as set out above?

Central Early Years Expenditure

31. The requirement here is for the Schools Forum to approve the central expenditure. This is not the expenditure provided to settings for their running costs in providing the free entitlement for under two, two and three and four year olds but is in respect of support services for providers of early years education.
32. Following the introduction of the Early Years Funding Formula, central overheads were previously limited to 5% of the Early Years Block Funding for 3 and 4 year olds. With the extension of eligibility entitlements in 2024-25, (15 hours for all 2 year olds from April 2024 and 15 hours for 9 months and over from September 2024) the 5% limit has now been expanded to cover all thresholds to allow local authorities to retain more funding to cover the central costs of the new expanded service. For 2024-25, the authority is asking for £2.2m to be retained centrally.
33. The growth of the eligibility entitlements makes estimating funding uncertain as demand is unknown. Based on the Government's current forecast of take up, the authority's ask of £2.2m (which equates to 2.4% of eligible funding) is considerably below the allowable funding of 5%. It is likely that the ask for future years Early Years centrally retained funding will increase as the eligibility entitlements continue to expand. However, we anticipate any centrally retained funding to be well within the Government's thresholds. It is the Government's intention in time to bring the allowable threshold down to 3% as entitlements increase.

34. The £2.2m funds Statutory functions, along with Back office administration and overheads. The breakdown of costs between these activities is shown below:

	£'000
Early Years Team	1,858
NEF Team, System, Finance and General Overhead Support	363
Total cost of SCC overheads	2,221

35. SCC will provide the following statutory functions, for all age ranges, including the expanded entitlements for 2 year olds and the new under 2 year old entitlement:

- a. Collection and Submission of Early Years Foundation Stage (EYFS) profile data.
- b. Quality Liaison: Under S13 of the Childcare Act 2006, LA's are required to provide information, advice and training to providers.
- c. Business support and market development: Under Section 6 of the Childcare Act 2006, LA's have a duty to secure sufficient childcare for working parents and Section 7 sets out a duty to secure early years provision free of charge. This element of the SDA is a vital function to ensure sector capacity and sustainability across the county.

36. In back office administration terms, the allocation funds a team to undertake transactions, financial processes, auditing and managing queries so all providers receive prompt payment.

37. The allocation also funds management capacity, sufficiency analysis, the provider portal and database, oversight of eligibility checking for funded places, compliance and Information, Advice and Guidance for providers, parents and professionals in accordance with the Statutory Guidance for Early Education and Childcare.

38. The Overheads cover the cost of general support to the back office administration. General support includes costs of ICT, Property, Legal, Web Team and the Customer Service Centre

39. The new 2 Year old rate and 9 months and older rate will now be subject to the same Government formula requirements as the 3 and 4 Year Old rate,

including a mandatory deprivation supplement and other factors such as an element of centrally retained funding. Staffordshire intends to run a 4-week consultation with Early Year providers on high level principles for setting the 2 year old and under rates for 2024/25 and beyond. This consultation will start on Monday 13th November and close on Friday 8th December. A paper consulting on the views of Schools Forum will go to January's Forum, which will include the results of the consultation with Early Years providers.

Does the Schools Forum approve the proposed level of central support services for early years' provision?

Education Functions for Maintained Schools Only

40. The functions provided to maintained schools only are listed in Appendix 3, along with the levy per pupil that will be required to fund each of these services.
41. If maintained school members do not agree to the levy required for any of the services listed, the funding and associated responsibilities for providing this service will be delegated to schools.

Do maintained Schools Forum members agree to the levies per pupil presented in Appendix 3 to fund the costs of the associated services?

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Further Information on Areas Affected by the Schools Forum Vote on De-delegation

Maintained Primary and Secondary Schools Only

Background

1. The arrangements set out in this note apply to **maintained primary and secondary schools only**.
2. Under the national funding arrangements the government want schools to have the opportunity to have as much funding and responsibility delegated to them as possible. Each year Schools Forum representative is required to vote to determine whether or not a range of costs currently met centrally will transfer to schools for you to manage yourselves. The budget for these costs would also transfer to schools on a formula basis.
3. The vote is taken by maintained schools representatives only, as academies automatically have the funding and responsibilities for these areas. The vote is binding by phase – so for example if primary school representatives voted for the budget for one of the headings to be delegated then it must be delegated for all primary schools.
4. This note sets out some further information on the affected areas. Budget values are indicative and represent the total for primary and secondary schools, including academies.

Insurance

5. Maintained Schools currently receive their insurance provision from the Risk Protection Arrangement (RPA) provided by the Department for Education. Insurance cover provided includes:
 - a. Material Damage
 - b. Business Interruption
 - c. Employers' liability
 - d. Third party liability
 - e. Governors' liability
 - f. Professional indemnity
 - g. Employee and third party dishonesty
 - h. Money
 - i. Personal accident
 - j. UK travel
 - k. Overseas travel
 - l. Legal expenses
 - m. Cultural assets
6. If this area is delegated, schools will have a choice to purchase their insurance cover from the RPA or seek an alternative arrangement from another provider.
7. Schools would be required to ensure that any external arrangements meet the authority's minimum standards of cover. The County Council would also need to assure itself that the cover was compliant. A small administrative fee will therefore be charged to any school opting to insure with another provider.
8. Most providers would offer cover over a long term arrangement, say 3 or 5 years. Insurers will normally offer a discount for long term arrangements. Agreements over longer periods would mean that for most schools a full tender procedure would have

to be carried out in order to be compliant with schools procurement regulations. The current RPA policy runs until the 31 March 2023, and therefore, if schools opt for delegation they would need to commence a procurement exercise in good time to ensure that cover was in place by 1 April 2023.

9. Under a delegated arrangement wherever schools purchase their cover from, the premium rates would normally include up to 5 years claims history for each individual school.
10. It is likely that the cost of insurance would be higher if procured at individual school level due to loss of economies of scale experienced by the RPA.

Maternity pay

11. At present, episodes of maternity leave for school teachers are funded centrally from the schools' budget. An individual school therefore need only consider how they replace the teacher on maternity leave. Costs are recorded at individual school level.
12. This is an unpredictable budget and under a delegated arrangement schools would be responsible for meeting all the costs associated with an episode of maternity leave.
13. The impact of this may be greater for smaller schools where one staff member comprises a larger proportion of the workforce and the potential cost of maternity pay. Schools should also consider the possibility of there being multiple maternity episodes within the same year.
14. In the event that this particular item was delegated schools may wish to consider schemes from other providers which offer an insurance arrangement.

Union duties

15. Following the report to Schools Forum in October 2015, 80% of the fund will cover the following four professional teaching associations:
 - a. Association of School and College Leaders (ASCL)
 - b. National Education Union (NEU)
 - c. National Association of Head teachers (NAHT)
 - d. National Association of Schoolmasters Union of Women Teachers (NASUWT)

The remaining 20% of the fund will support the Green Book Support Staff Trade Unions.

16. The budget provides funding to enable association representatives to work with the Local Authority on developing policy and related matters. It also provides for Association representatives to support individual colleagues in disputes or other employee related matters.

School Specific Contingencies

17. This budget provides a safety net where unanticipated and significant costs occur, which it would not be reasonable for the school to meet. At present staff suspensions are covered from this budget, as are significant teacher pension arrears which can run

to several thousand pounds. Other examples could include where a school has been presented with a significant utility bill or emergency premises works.

18. Under a delegated arrangement, individual schools would be responsible for meeting the full cost of such events. The impact of this is likely to be greater for smaller schools.

Support for ethnic minority pupils or under-achieving groups

19. This budget covers both the funding devolved to individual schools through the locally agreed formula, which is the majority of the funding, and the MEAS team. Under a delegated arrangement the services currently provided to schools through the MEAS team would have to be offered on a traded basis, where charges to individual schools reflected the actual cost of delivery to that individual school. The funding currently devolved to schools through the local formula would also cease. Instead schools would receive a formula allocation using the government permitted formula basis which would not target resources in the same way.
20. The government framework allows a maximum period of targeting resources to EAL pupils of their first three years within the English school system. However, it often takes pupils much longer than this to acquire the academic language needed for success in national tests and assessments. The locally agreed formula uses a different basis to allocate funding to schools and takes account of under-achieving groups as well as EAL pupils, as not all EAL pupils attain lower than the indigenous population. In this way it targets funding at under-achieving groups much more closely than the national framework would allow.
21. Whilst the number of EAL pupils currently in Staffordshire secondary schools is relatively low the number is increasing rapidly in the lower age groups and without sufficient support these pupils are likely to arrive at secondary schools behind their white British peers.
22. In the event of delegation the funding currently allocated to individual schools would not be automatically protected through the MFG since it is outside the delegated budget.

Licences and Subscriptions

23. A number of licences are currently funded centrally on behalf of schools. These include:
 - a. Consortium of Local Education Authorities for the Provision of Science Equipment (CLEAPSS) Subscription
 - b. My Finance licences
 - c. SIMS annual maintenance charge
24. Forum members agreed to extend the existing SIMS contract for 5 years (until 31/03/2024) at the July 2018 meeting.
25. The County Council currently benefits from bulk-purchasing and real costs for individual schools are likely to be higher because of the additional administrative burden placed on both the licensing agency and schools.
26. Schools could incur penalties directly if they failed to renew their licences.

Behaviour Support Services (BSS) (Primary phase schools only, already delegated for secondary schools including middles)

27. Schools need to consider the time, resources and expertise required to undertake behaviour support type interventions directly. In addition, the BSS brings the objectivity of a team not directly employed by the school. De-delegation ensures that early intervention is not neglected. If schools/settings have unlimited, universal access to support and advice, they are more likely to request it at an early stage, therefore having a greater impact and reducing the likelihood of difficulties escalating.
28. The current BSS team consists of specialist qualified staff providing high standards of service. They are able to meet the needs of a large County despite relatively low staffing levels. There is a risk that access to specialist staff will be lost if the service is delegated or schools choose to manage their own risk.
29. Meeting the needs of all vulnerable children and young people in a community requires schools not only to be effective individually, but also to collectively consider needs and resources across an area to ensure that vulnerable children or young people have a school place that meets their needs, including taking collective responsibility for the education of children at risk of exclusion or permanently excluded pupils.
30. The Behaviour Support funding may already have been allocated when pupils are permanently excluded from one school but then placed in another school.
31. There is also the risk of delay in securing support leading to an escalation of the difficulties and making successful remediation more difficult, lengthy and expensive (both monetarily and in terms of educational outcomes for pupils).

Assessment of eligibility for Free School Meals

32. Under delegation schools could buy into a Service Level Agreement with the Staffordshire Free School Meals Entitlement Checking Service, or make their own arrangements to handle all aspects of free school meal claims without any assistance from the Authority
33. Schools who buy into the SLA have access for their parents to make applications through our online form which gives an instant yes or no response and carries out rechecks on those not found as entitled. The service confirms initial and ongoing entitlement, applies the present entitlement criteria as a result of the introduction of Universal Credit and the transitional protection for claims announced by the government, and will also apply the necessary changes when the transitional protection ends. The service also manages all contact with parents to resolve any issues and a web-based reporting system is provided for schools to access reports for their claim information. Schools admissions and pupil premium information is also used to move claims between Staffordshire schools or identify those who may be entitled for schools to target for an application to be made.
34. Schools who do not buy into the service must make their own arrangements to handle all queries and communication with parents, applying the law and any changes to that law as they occur. They would also need to identify themselves any new pupils who are or may be entitled to free school meals.

Responsibilities Local Authorities hold for all schools

	2023/24 Amount (£)	2024/25 Amount (£)
Statutory & Regulatory Duties		
Director of Children's Services and personal staff for Director (Sch 1, 20a)	120,650	124,269
Planning for the education service as a whole (Sch 1, 20b) & Admissions	1,338,457	1,378,610
Revenue budget preparation , preparation of information on income & expenditure relating to education, and external audit relating to education (sch1, 20d)		
Administration of grants (sch 1, 20e)	509,449	524,732
Authorisation and monitoring of expenditure not met from schools' budget shares (sch1, 20fi)		
Formulation and review of local authority schools funding formula (sch 1, 20g)		
Internal Audit and other tasks related to the authority's chief finance officer's responsibilities under section 151 of LGA 1972 except duties specifically related to maintained schools (Sch1, 2i)	60,646	62,466
Standing Advisory Committees for Religious Education (SACREs) (Sch 1, 24)	10,886	11,615
Total Statutory & Regulatory Duties	2,040,087	2,101,692

Education Welfare		
Statutory Education Welfare activities	557,458	574,182
Total Education Welfare	557,458	574,182

Asset Management		
General landlord duties for all buildings owned by the local authority, including those leased to academies.e.g. checking that statutory compliance testing has been completed annually	257,981	292,246
Total Asset Management	257,981	292,246

Overheads		
Legal Services related to education functions (sch1, 20u)	260,109	267,912
HR Overheads	72,366	74,537
Total Overheads	332,476	342,450

Other Ongoing Duties		
Licenses negotiated centrally by the Secretary of State for all publicly funded schools (sch2, 8) This does not require schools forum approval	716,405	800,772
Maintenance & Servicing of Schools Forum	14,173	14,598
Total Other Ongoing Duties	730,578	815,371

Total Ongoing Education Functions	3,918,580	4,125,940
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Total amount included within provisional Central Schools Block allocation for ongoing functions	4,086,711	4,299,600
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Responsibilities Local Authorities hold for Maintained Schools

	2024/25 Amount (£)	Amount per pupil 2024/25 based on Oct 22 Census (£)	2023/24 Amount per pupil (£)
Regulatory Duties			
Functions related to local government pensions and administration of teacher's pensions in relation to staff working at maintained schools under the direct management of the head teacher or governing body (Sch 1, 20m) Transaction costs of administering compensation benefits	45,000	1.67	1.58
Compliance with duties under Health & Safety at Work Act (Sch 1, 20s)	20,993	0.78	0.73
Establish and maintaining computer systems including data storage (Sch1, 22)	165,000	6.11	5.79
Appointment of governors (Sch1, 26)	28,093	1.04	0.97
Total Regulatory	259,086	9.59	9.07
Asset Management			
Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch1, 10a)	90,903	3.19	3.05
Monitoring national curriculum assessment			
Statutory Monitoring of national curriculum assessments (Sch 1, 23)	63,356	2.35	4.18
Asset Management			
Statutory landlord duties for all maintained schools (Sch 1, 10a (section 542 (2) Education Act 1996; School Premises Regulations 2012) including compliance testing for water, gas, electricity and asbestos. This budget was previously held centrally but was delegated to schools at December 2016 Schools Forum	904,752	33.49	31.39
Premature retirement and redundancy			
Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch1, 25) This budget was previously held centrally to meet 30% of redundancy costs but was delegated to schools at the December 2016 Schools Forum	250,000	9.25	8.77
Total General Duties	1,568,097	57.87	56.47

Schools Forum – 9th November 2023

High Needs Block update

Executive Summary:

- The forecast outturn for the 2023/24 High Needs Block is £20.0m overspend.
- At the end of the last financial year the DSG reserve is in deficit by £14.2m and will deepen to more than £30m given the expected overspend in 2023/24.
- Indicative Government funding next year will see Staffordshire's High Needs Budget increase to £131m (c 3% higher than 23/24). This is considerably lower than recent rises and – whilst in line with expectation - will likely see the overspend increase in 2024/25 to c £25m.
- Left unaddressed the accumulated DSG Deficit is forecast to worsen over the next 4 years to between £150m and £225m by 2027/28.
- A 'Deficit Management Plan' (DMP) has been worked up, based on the Council's SEND Strategy and Accelerated Progress Plan (APP), that aims to develop a more inclusive system where more CYP with SEND access mainstream education - wherever possible within their local community - and if appropriate with specialist support. This will provide for a more sustainable model, with better outcomes for our CYP and reduce reliance on the non-maintained and independent sector.
- This will take time to impact and, in order to limit the extent of the accumulated deficit arising over the next few years, the DMP also includes a range of interventions and policy reviews that will provide for additional resource / reduce costs in the short and medium term.
- Given the continuing SEND demand, and growing deficit, Schools Forum are being asked to approve the transfer of 0.5% funding from the schools block for high needs in 2024/25. This forms a key part of the Council's DMP.
- The DMP will be monitored going forward and brought forward regularly to Schools Forum as part of the routine HNB update report.

Recommendations:

That Schools Forum notes:

1. the High Needs Block budget 2023/24 and latest forecast outturn
2. the latest budget assumptions 2024/25 and going forward
3. the Deficit Management Plan 2023/24 – 2027/28
4. the outcomes of the Council's consultation with schools regarding the 0.5% funding switch in 2024/25.
5. **That Schools Forum agrees to the 0.5% transfer from the Schools Block of the DSG to the High Needs Block (HNB) in 2024/25.**

Report of Director for Children & Families

Background

6. The financial risk of the High Needs Block (HNB) has been a standing agenda at Schools Forum. The increase in demand on the HNB has been reported regularly. Pressures on the HNB are ongoing due to the continued increase in a range of areas. These include:
- Additional needs requests
 - Increase in pupil numbers requiring EHCPs,
 - Extension of age group to 25 for those with EHCPs,
 - Increase in independent placements and costs,
 - Increase in 'top up' funding for special schools,
 - The funding of increased numbers of pupils educated 'other than at school' (EOTAS)
 - Increase in the number of pupils permanently excluded (and back to pre-pandemic levels)

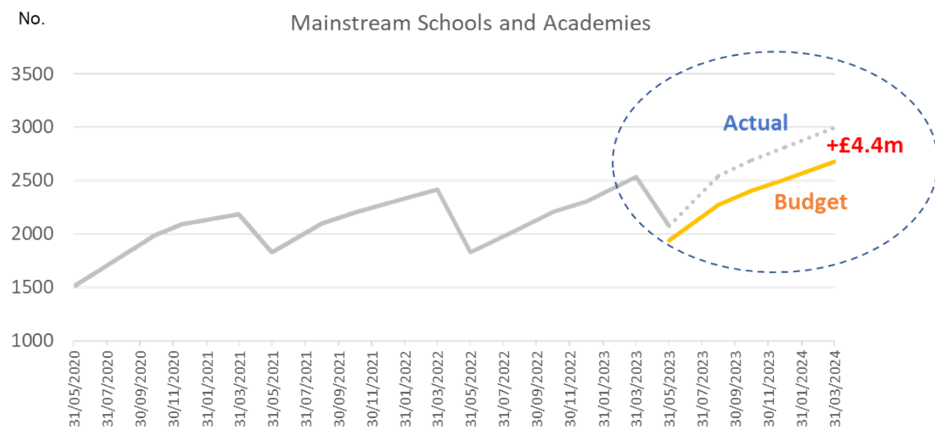
Budget 2023/24 and Forecast

7. For Staffordshire the High Needs budget 2023/24 is £127m; an increase of £12m compared with 2022/23 (10%). This increase has been passed on in full for the provision of SEND support; none of this funding increase will be used to repay historical deficits. Most significantly this has ensured for 2023/24 Special School budgets have been set to include:
- a Minimum Funding Guarantee of 0.5%; ensuring that funding for all Special Schools, on a like for like basis, will increase next year by a minimum of 0.5%. This is in line with Government guidance for a MFG of 3% over 2 years (Staffordshire approved MFG in 22/23 was 2.5%).
 - there will be no capping of school gains
 - [a payment equivalent to a further 3.4% will also be made to schools calculated in accordance with government guidelines outlined above]
8. Staffordshire's request this year for a transfer of 0.5% (equivalent to c £3.1m) from the Schools Block to the High Needs Block was refused by Schools Forum at its meeting November 2022. The Council submitted a disapplication request for the block transfer which was rejected by the Secretary of State for Education.
9. Whilst the additional Government funding is recognised, this is not keeping pace with rises in cost and demand and the gap is continuing to increase. The forecast overspend this year is circa £20.0m (see Appendix 1 for more detailed overview):

High Needs Budget 2023/24	Budget 23/24 £m	Outturn £m	(Under) spend £m
Planned Places	35.0	35.0	0.0
Top Up Budgets	44.3	55.2	10.9
<u>Non Top Up Budgets</u>			
Independent Schools (Mainstream & Special)	29.3	37.2	7.9
Alternative provision (inc Hubs)	3.8	4.3	0.5
Post 16	5.5	6.1	0.6
Other	9.1	9.1	(0.0)
Total Net Spend	127.0	146.9	19.9
Total Funding	(127.0)	(126.9)	0.1
Net Outturn	0.0	20.0	20.0

10. Key variances arising

- An overspend of c £10.9m against the school 'top up' budgets including most significantly:
 - a rise in the number of children with EHCP/AEN support in Mainstream Schools and Academies leading to a £4.4m overspend:



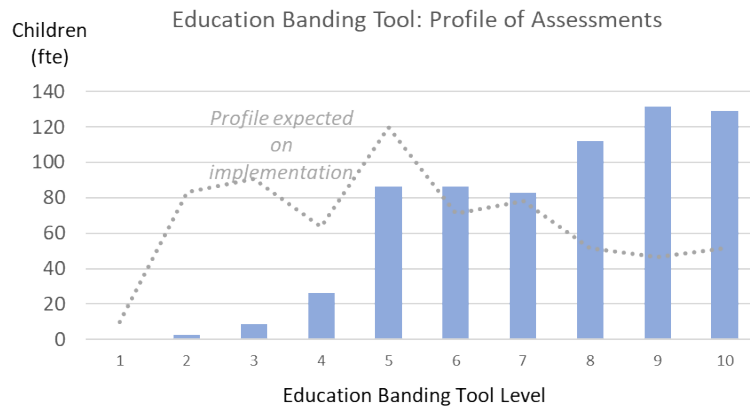
- An overspend of £5.2m in special schools and academies due to the combined impact of increasing demand, complexity and costs:

		2023/24		
<u>Top Ups</u>	# fte		£m	
Matrix 1	361	20%	0.1	
Matrix 2	648	36%	1.1	
Matrix 3	801	44%	6.9	8.0
School Specific	1810			2.1
Additional Places				0.8
Enhancements				2.2
Exceptional Need				0.6
Residential				1.8
Adjustments (part time / backdated)				0.6
EBT (1-10)	666			7.4
EBT (school specific)				0.5
EBT (override)				0.1
Allowance for more growth				3.2
Total Spend				27.4
Budget				22.2
Variance				5.2

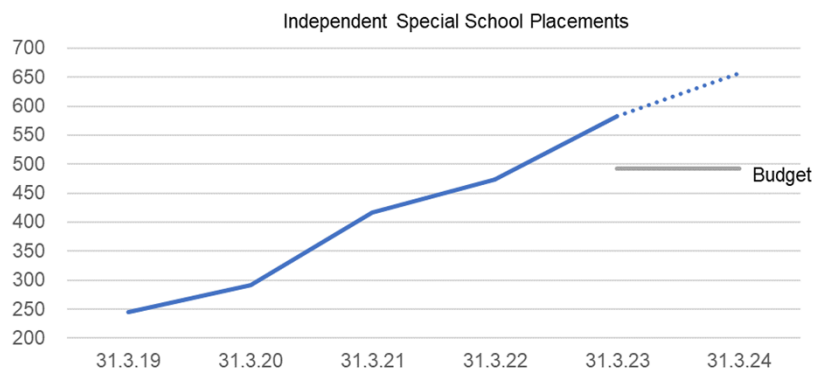
Average £/fte
0.007

Average £/fte
0.012

The following shows the profile of assessments allocated under the Education Banding Tool. It is heavily weighted towards the highest banding levels 8-10, considerably higher than had been anticipated, and is giving rise to the significantly higher average cost per child (fte) compared to the existing Matrix model.



- An overspend of c £0.4m for Pupil Referral Units due to increasing numbers of pupil exclusions which are now back to pre-pandemic levels
- An overspend of c £7m in Independent Special Schools



- Other net overspends of c £2.1m due to increasing demand, most significantly for Independent mainstream provision, Post 16 provision and Early Years (SEN Inclusion fund).

Education Banding Tool (EBT) Update

Following the planned review of the EBT during Summer 2023, the decision was made, from 1 August 2023, to suspend the EBT to calculate the top-up funding for Staffordshire pupils with an EHCP and therefore from this date we have reverted back to the previous funding models for mainstream and special schools.

All schools were informed of this following the confirmation at the 13 July 2023 meeting of Schools Forum in a letter, from the Assistant Director for Education Strategy and Improvement, dated 19 July 2023.

Since the 1 August 2023, any top-up funding for EHCPs that have not yet been finalised or any changes to plans following an annual review have not been calculated using the EBT. Instead, top-up funding for special schools have been calculated using the matrix model and mainstream schools funded for allocated hours. Where a plan had been finalised prior to 1 August 2023 and an EBT funding level agreed, this has continued to be funded at the agreed EBT amount, at this time. Please note that the updated [Special School Matrix](#) document and details of [mainstream funding](#) levels is now available on the Local Offer.

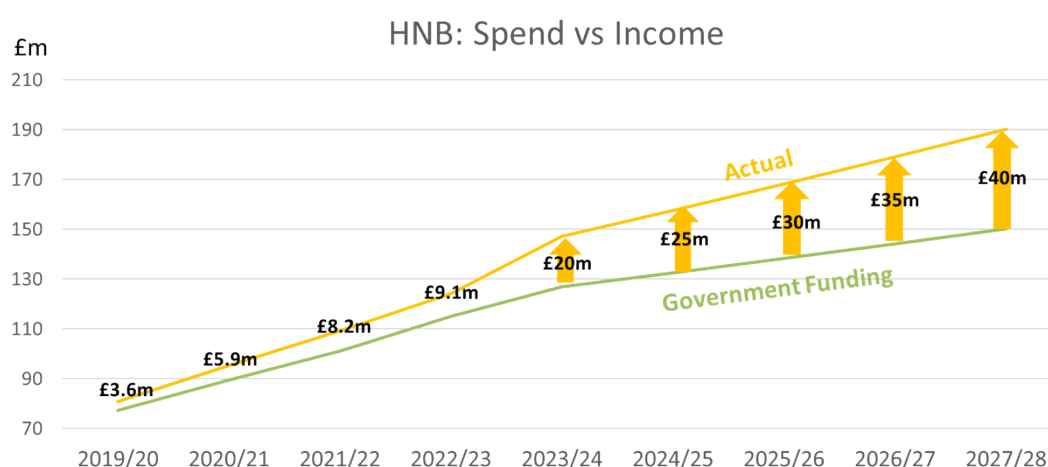
The LA is still committed to the EBT and is currently undertaking a remodelling of both mainstream and specialist band values, ensuring the quality assurance steps are in place, as well as a review of the EBT formula, with the intention of reinstating the EBT autumn 2024 with the assurance that all issues experienced have been resolved. The current mandatory EBT training for SEND staff has been refreshed by Imosphere and all key SEND staff have completed the updated on-line training and attended a half day workshop to improve consistency when completing the Pupil Needs Profile (PNP).

SEND staff will continue to complete a PNP for new EHCPs and where there are changes to a plan following a review, with the aim to provide a new data set to use for budget modelling in Spring 2024 and to support future decision making regarding the reinstatement of the EBT. The individual PNPs will remain an internal document and will not be shared with parent/carers or Education Providers. The LA will continue to keep schools informed of this progress next term, with the aim of an education provider consultation undertaken prior to an agreed re-launch of the EBT.

Budget 2024/25 and Going Forward

11. In 2024/25, based on initial estimates, Staffordshire's high needs budget next year will increase to c £131m (an increase of just 3% compared to 2023/24). This is significantly lower than previous years and the assumption is that, going forward, the HNB will continue to rise annually by just c 3% - 4% p.a. from 2025/26.

12. Whilst this is broadly in line with expectation (in fact slightly lower), it is not unusual for further funding to be released in the Autumn statement – however this cannot be assumed and, in the event, will likely only increase funding to the level already assumed in our financial forecasts of around £132.5m
13. Though previous rises have been passed on in full for the provision of SEND (none has been used to repay historical deficits), funding has struggled to keep pace with increases in demand and cost and have been insufficient to ‘close the gap’ which has gradually increased. Given the lower level of Government funding now assumed going forward, we anticipate the annual funding gap will increase significantly year on year. It is forecast there will be a further overspend next year of at least £25m and – left unaddressed – will likely increase annually going forward to at least £40m by 27/28:



[Note: the HNB Operational Guidance 2024/25 (section 18.1) provides guidance regarding the maintenance and funding of EHCPs for other authority ‘Looked After Children’. There is a risk that this could lead to a significant additional burden and we continue to monitor the situation.]

Accumulated DSG Deficit

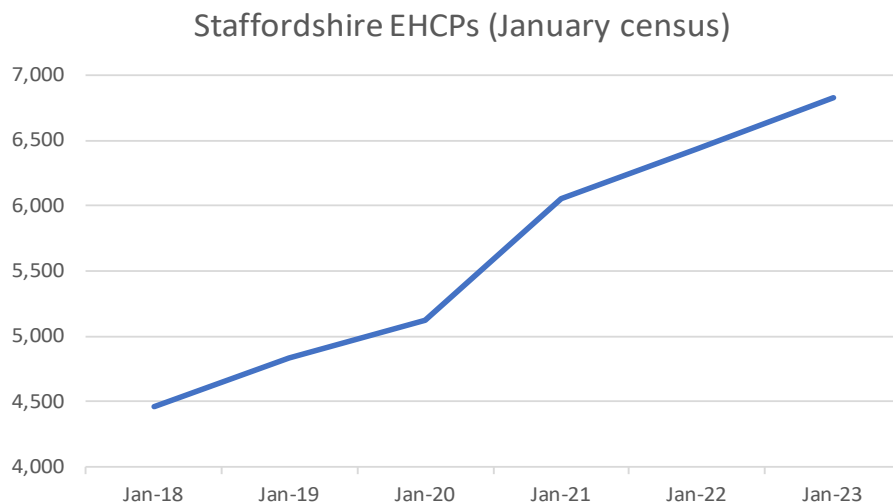
14. As a result of the on-going overspend in the HNB, over the last few years the DSG reserve has been fully depleted and at the end of last year (22/23) there is an accumulated deficit of c £14.2m. Given the latest forecast overspend 2023/24 of £20m that deficit is likely to increase this year and, after the transfer of anticipated surpluses from Growth Fund and Central Block, is forecast to be over £30m in deficit at the end of the current year:

	£m
Accumulated deficit b/f	14.2
- Forecast HNB Overspend 23/24	20.0
- Forecast Growth Fund surplus 23/24	-1.5
- Forecast Central Block surplus 23/24	-0.5
Forecast Accumulated deficit end of 23/24	32.2

15. The HNB overspend – and accumulated deficit - is mainly due to increased demand for Special Educational Needs provision and in particular:
- the rise in demand for Education, Health and Care plans (EHCPs) following national reforms from 2014;
 - increasing complexity of children’s needs; and
 - the rising demand and costs for out of county (Independent) placements.

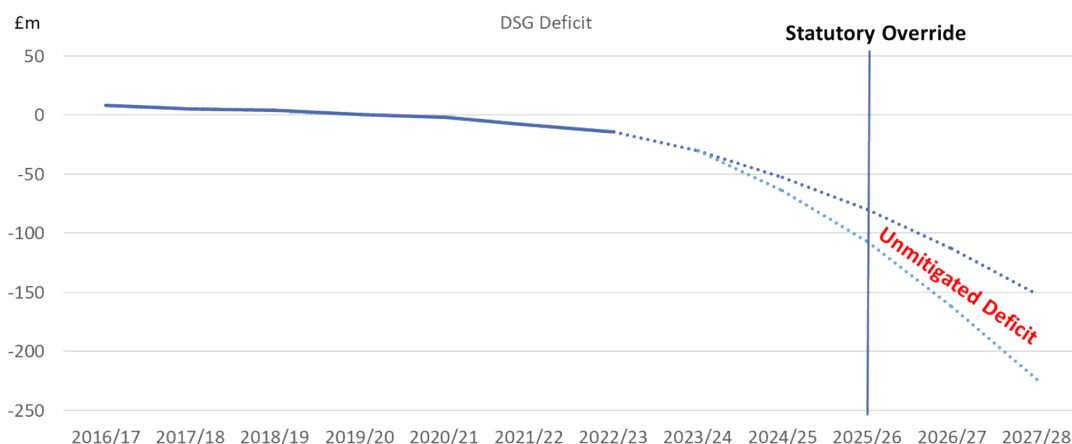
In particular there has been a significant increase in demand for those CYP with a primary need of Social, Emotional and Mental Health (SEMH), Speech, Language and Communication (SLC), or Autism Spectrum Conditions (ASC) and there is an increasing population of CYP presenting with anxiety and associated mental health conditions which are preventing attendance at school, placing increasing pressure on the Alternative Provision element of the HNB due to the additional use of tuition and EOTAS.

16. The following shows the rise in demand for EHCPs within Staffordshire over the last 5 years; whilst increases are in line with (in fact slightly below) the national trend, data also indicates that we have too many CYP with EHCPs educated in the specialist sector:



	Jan-18	Jan-19	Jan-20	Jan-21	Jan-22	Jan-23
Staffordshire	4,456	4,835	5,117	6,056	6,437	6,830
Year on Year change		8.5%	5.8%	18.4%	6.3%	6.1%
Nationally	319,819	353,995	390,109	430,697	473,255	517,049
Year on Year change		10.7%	10.2%	10.4%	9.9%	9.3%

17. Pressures on the HNB and resulting accumulated DSG deficit is a key risk faced by the Council and is being monitored closely as part of its corporate finance and performance reporting. Going forward it is anticipated that demand – and costs - will continue to increase in line with historic rises. Given the anticipated annual HNB overspend, this could see the overall accumulated DSG deficit increase to between £150m and £225m by the end of 2027/28:



18. Given the current level of ‘DSG deficits’ within the system, a further intervention has been brought forward – this time by DLUHC – requiring authorities to hold DSG deficits in a separate reserve in the authorities accounts¹. Whilst initially a temporary ‘statutory override’ for the 3 years 2020/21 to 2022/23, due to the worsening situation this has since been extended to end of 2025/26 and effectively restricts the Council from applying its general resources to help support the High Needs Block. It is currently unclear how accumulated deficits will be managed beyond that time.

SEND Strategy & Accelerated Progress Plan

19. The local authority has a strategic plan on how, over time, it intends to bring the HNB to sustainable levels:

Developing Targeted Support

- The local authority is supporting the SEND & Inclusion district model which has created collaborative working between ourselves and schools. As part of this project the LA, schools and other stakeholders, have established a locality based model - at a District level - enabling early intervention for the benefit of pupils who are identified as being in need.
- A further development of the Enhanced Assess-Plan-Do-Review (EAPDR) Pathway has been co-produced with schools, education settings, Parent Carer Forum, Health, Social Care and Educational professionals in order to support schools and educational settings with capacity to meet a child or young person’s SEND needs by accessing the right support, in the right place, at the right time.

Collaborative Working

- The LA is working closely with independent providers, both existing and new, to identify cost effective provision for high needs placements that offers value for money and ensures good outcomes for pupils with SEND.
- Using the DfE SEND capital funding to create additional provision in Staffordshire special schools based on a detailed analysis of need,

¹ The Local Authorities (Capital Finance and Accounting) (England) (Amendment) Regulations 2020

specifically in relation to social emotional mental health needs (SEMH) and Autism.

- A pre-statutory Staffordshire Enhanced District Inclusion Support Model (SEDIS) accessed via an Enhanced Assess-Plan-Do Review Pathway to provide mainstream educational settings with the resources and support to deliver the graduated response.

Partner Contributions

- The Council will continue to ensure a fair contribution is made from health and social care partners towards the cost of specialist places and provision where appropriate.

20. The Council has put in place significant additional investment of c £3m to support a locality based model - at a District level - enabling early intervention for the benefit of pupils who are identified as being in need. This is essential to enable the long term changes outlined above but is an additional pressure on existing scarce/overstretched HNB resources.
21. No single action alone will be sufficient to mitigate the existing deficit, but this will only be addressed through a combination of interventions. A longer term financial management plan to recover the deficit, using the ESFA recommended 'deficit management plan' template, has been developed that is consistent with the actions and objectives outlined in the Council's Accelerated Progress Plan and wider SEND Strategy.

Deficit Management Plan

- Background

22. Under Department for Education (DfE) guidance, as outlined in the DSG Conditions of Grant, any local authority with an overall deficit on its DSG account "must co-operate with the DfE in handling that situation". In particular, the authority must:
- provide information as and when requested by the department about its plans for managing its DSG account
 - provide information as and when requested by the department about pressures and potential savings on its high needs budget
 - meet with officials of the department as and when they request to discuss the authority's plans and financial situation
 - keep the schools forum regularly updated about the authority's DSG account and plans for handling it, including high needs pressures and potential savings

The Secretary of State reserves the right to impose more specific conditions of grant on individual local authorities that have an overall deficit on their DSG account, where they are not taking sufficient action to address the situation.

23. The DfE acknowledges the pressures which local systems are experiencing delivering SEND services and has brought forward two intervention programmes for those authorities with the largest deficits:

- Safety Valve; a programme of targeted support / 'bail out' agreements for those authorities (c 34 in total so far) with the greatest DSG deficits. These agreements will hold the local authorities to account for delivery of reforms to their high needs systems, so that they can function sustainably and therefore in the best interests of the CYP they serve. These local authorities will be expected to reach an in-year balance on their DSG as quickly as possible, and over time eliminate their deficits. The DfE have indicated that, if conditions are not met, then it "will not hesitate to withhold payments".
- Delivering Better Value (DBV) for SEND; a programme of support for local authorities to improve delivery of SEND services for CYP while ensuring services are sustainable. This optional programme is currently providing dedicated support and funding to 55 local authorities – chosen based on those with the greatest deficits as at 2020-21 (after those authorities that have already been invited to join the DfE's safety valve programme).

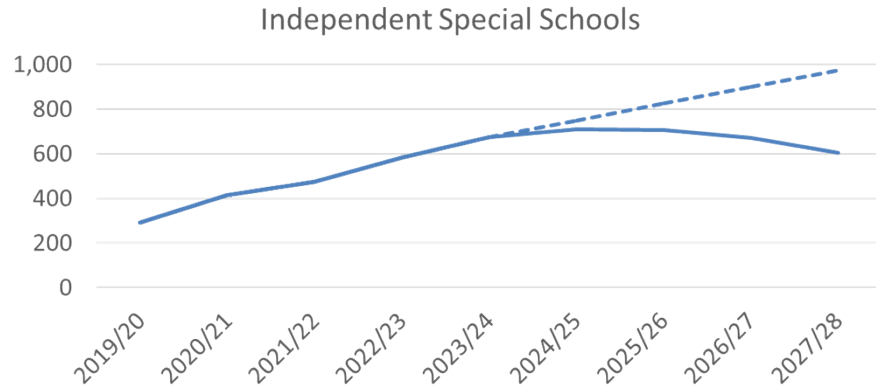
ESFA has confirmed that the programmes are available to those local authorities with the greatest DSG deficits and it is unlikely Staffordshire would be invited to join either programme.

- Key interventions

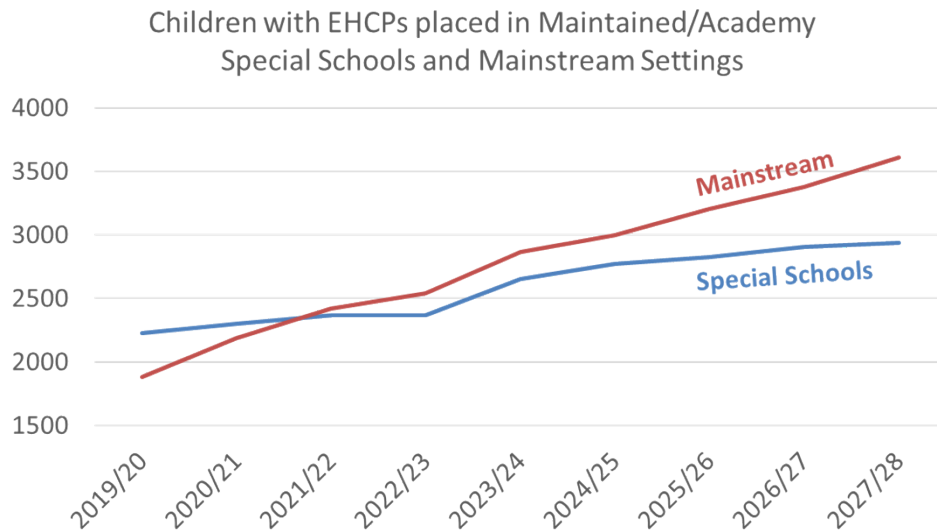
24. The DMP will mitigate – as far as possible - the funding gap which is expected to increase to c £40m by 27/28. This will require difficult decisions that impact on service delivery across all sectors including:

- a. fundamental to the strategy is the development over time of a more inclusive system where more of our children are educated and supported in our mainstream schools. By working with mainstream and special schools we will seek to provide the necessary support and capacity that will reduce the reliance on more expensive independent provision where this is not appropriate or necessary bringing the proportions of children educated within each part of the system in line with national proportions (target saving £18m by 2027/28).

As a result, it is anticipated that reliance on more expensive Independent provision will gradually reduce over the next few years:



However, over that same time, it will also require an increase in the number of children with EHCPs placed within our Maintained/Academy Special Schools and Mainstream settings:



- b. the Council will review existing policy, non-statutory provision and consider alternative delivery and funding options that could reduce the pressure on HNB (target saving c £4m by 2027/28)
- c. Transfer of 0.5% funding from the Schools Block to the High Needs Block (circa £3.2m in 24/25). This will be invested to fund the Council's transformation programme outlined above.

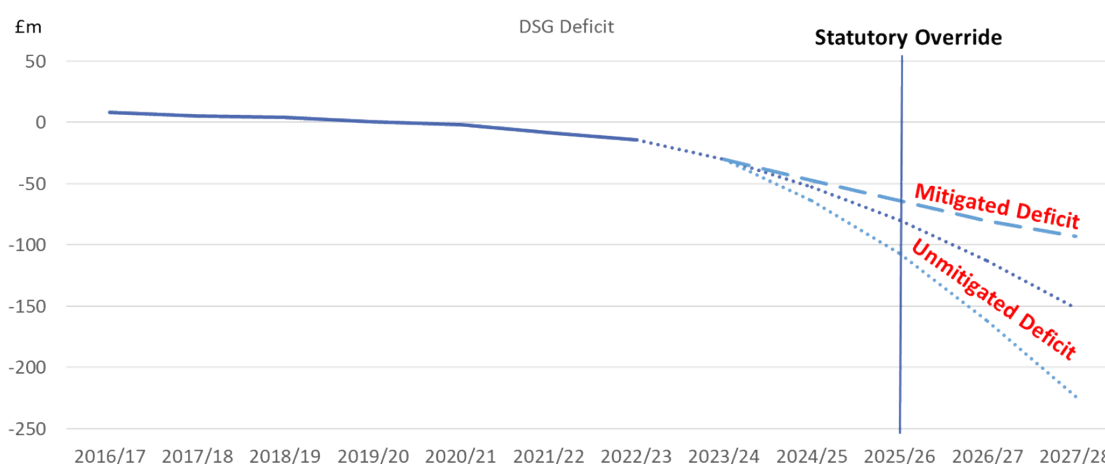
- Other

- 25. Schools Forum has agreed that the following other contributions should be earmarked for transfer to the Council's DSG reserve:
 - surplus Growth Fund money (after amounts have been used to fund NFF shortfalls and contributions to schools for in year growth²). In 2023/24 this is estimated to be c £1.5m and a further £1m contribution is forecast for 24/25.

² In accordance with the Councils' Growth Fund Policy

- surplus unallocated funds, as part of the allocation of on going education functions (central schools services block). For 2023/24 this is estimated to be c £0.5m and for 2024/25 is c £0.3m (including both on going functions and historic commitments);

26. Whilst this will not address the accumulated deficit, it will limit the shortfall to between c £100m by 27/28 to be addressed over the longer term. Going forward the Council will seek further opportunities to make efficiencies and – with our partners across the sector (e.g. Society of County Treasurers (SCT), EMFOG, LGA, CCN and the F40) - will continue to lobby central government for funding increases which properly match the levels of need in Staffordshire.



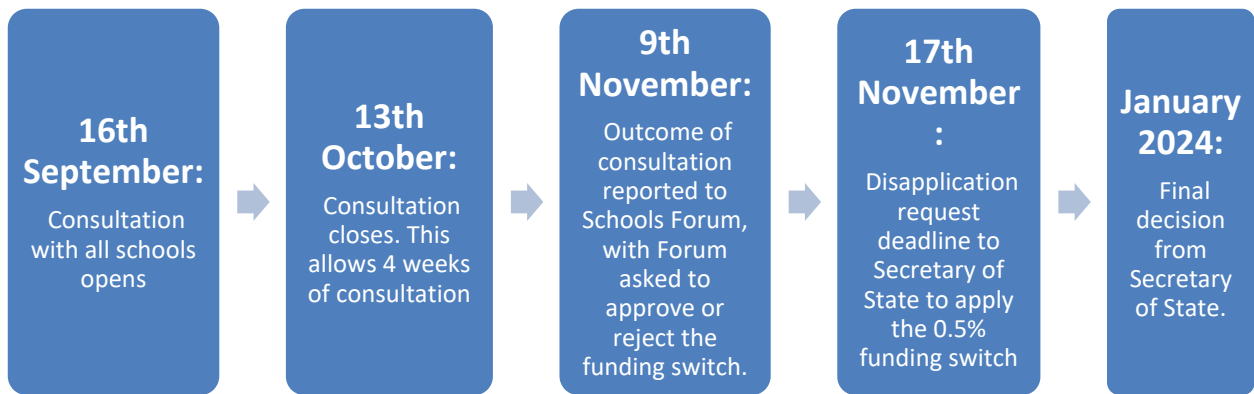
0.5% Funding Switch (Schools Block to High Needs Block)

27. Whilst our SEND programme is expected to reduce pressures in this area over time, this is unlikely to have a significant impact in the short term. Given the existing DSG deficit, it is essential that the Council takes action to mitigate as far as possible the increasing financial pressures in this area.

28. The Schools Operational Guide 2024/25 (Section 30) confirms that local authorities may transfer up to 0.5% of their schools block funding into another block, with the approval of their Schools Forum:

“The schools block is ring-fenced in 2024 to 2025 in line with the DSG conditions of grant, however local authorities can transfer up to and including 0.5% of their schools block funding into another block, with the approval of their schools forum.

29. In order to make a transfer of budget from the Schools Block to the HNB, the Council must consult with all local maintained schools and academies, so that the Schools Forum can take into account the views of all schools before deciding whether to approve or reject the funding switch.



30. The total amount that would be transferred would be determined by the 2024/25 allocations confirmed in December 2023. However, based on latest forecasts, it is expected that this would be in the region of £3.2m. Importantly, latest guidelines also require local authorities to set a Minimum Funding Guarantee of between +0% and +0.5% even after the funding switch has been applied.

School Consultation

31. At the meeting of the Schools Forum on 13 July 2023, members were notified of the proposal to enter into consultation with schools and academies on the 0.5% funding switch to HNB in 2024/25. The consultation (see Appendix 2) commenced on Friday 15 September and closed at 5pm on Friday 13 October 2023. This allowed four weeks for schools to respond.

The result of the consultation is as follows:

	Positive	Negative
Total responses received (38)	8	30

Further details and supporting commentaries are available at Appendix 3.

32. The view of schools is largely opposed to the transfer (see above) but on a low sample (response rate of only 10%). Further details and supporting commentaries are available at Appendix 3.

33. Given the existing deficit, and lack of available reserves to manage financial risk, it is appropriate that a transfer of 0.5% from the Schools Block to the HNB is made in 2024/25. This forms a key part of the Council's DMP.

We therefore request approval by Schools Forum to make the 0.5% switch

34. In previous years Schools Forum has recognised the significant pressure on the HNB but also want to take a position that DfE should be funding the increase in demand following the publication of the SEND code of practice. Therefore sending a clear message to the SoS. However this lobbying position has not had the desired effect and therefore the Council is asking Schools Forum to change their position as it is unlikely the DfE will consent to the switch without Schools Forum support.

35. In the event of Schools Forum refuse the switch then the Local Authority will make representation to the Secretary of State for the switch to take place (deadline for disapplication referrals is 17th November).

Equality Implications

36. The key groups affected by the proposals are CYP with special educational needs and disability (SEND) aged 0-25 in Staffordshire. The Council is committed to inclusive education for all CYP with SEND in our mainstream schools, enhanced resource schools and special schools.
37. The DSG DMP has been developed in order to improve outcomes for CYP and achieve financial sustainability. The proposals support the needs of CYP with SEND to be met earlier through evidence based interventions and aim to increase the number who access mainstream education- wherever possible within their local community - where appropriate with specialist support – and reduce our reliance on high cost placements in the non-maintained and independent sector.
38. There are considered no equality implications arising as a consequence of the proposals in this report.

Stakeholder Consultation

39. The Council's Accelerated Progress Plan and SEND Strategy has been developed/coproduced following consultation and engagement with representatives from across the education sector and, through the SEND & Inclusion Partnership Group, with parent and carers, elected Members and Health partners. The DMP is supportive and consistent with the actions and objectives outlined in the Council's Accelerated Progress Plan and SEND Strategy.
40. Going forward the DMP will be shared and monitored through the HNB Working Group and will be presented to each Schools Forum meeting as part of the routine HNB Update.

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Appendix 1 – Forecast Outturn 2023/24 (as at Quarter 2)

2023-2024 HIGH NEEDS BUDGET (Quarter 2)	Latest Budget	Forecast Outturn	Over/(Under) spend
	£m	£m	£m
Planned Places	35.0	35.0	0.0
Top Up Budgets	44.3	55.2	10.9
Staffordshire Special Schools and Academies	21.7	26.8	5.1
Staffordshire Mainstream Schools	17.9	22.3	4.4
Pupils in other LA Special & Mainstream Schools & Academies	2.3	3.3	1.0
Pupil Referral Units	2.4	2.8	0.4
Non Top Up Budgets	47.7	56.7	9.0
Independent Schools Mainstream	2.3	3.3	1.0
Independent Schools Special	27.1	34.0	7.0
Independent Hospital Fees	0.2	0.3	0.1
Early Years PVI's	0.4	0.7	0.3
Alternative provision (inc Hubs)	3.2	3.7	0.5
Education Other Than At School (EOTAS)	0.6	0.6	0.0
SEN Support Services	8.5	8.1	(0.4)
Post-16 FE Placements & Top-ups for ISPs	5.5	6.1	0.6
GRAND TOTAL	127.0	146.9	19.9
Funding	(127.0)	(126.9)	0.1
High Needs Allocation from Government	(127.0)	(126.9)	0.1
Transfers from other Blocks	0.0	0.0	0.0
NET FORECAST OUTTURN	0.0	20.0	20.0

Appendix 2: Consultation on the transfer of funding from the Schools Block to the High Needs Block 2024/25

The local authority will be making a request to Schools Forum in November for agreement to transfer 0.5% of the Schools Block to the High Needs Block. This is the amount specified by the DfE within the Schools Operational Guide 2024/25 (Section 30):

“The schools block is ring-fenced in 2024 to 2025 in line with the DSG conditions of grant, however local authorities can transfer up to and including 0.5% of their schools block funding into another block, with the approval of their schools forum. Without schools forum agreement, or where they wish to transfer more than 0.5% of their schools block funding into one or more other blocks, local authorities must submit a disapplication request to the Secretary of State.

If local authorities wish to transfer any funding out of the schools block in 2024 to 2025, the department expects to see evidence of recent schools forum discussion and the schools forum vote. This includes cases where schools forums have already agreed DSG recovery/management plans that assume future year transfers.”

In order to make a transfer from the Schools Block to the High Needs Block, local authorities should consult with all local maintained schools and academies, and the Schools Forum should take into account the views of the schools responding before making their decision.

The consultation will commence on 15 September and will close 5pm on 13 October 2023. This allows 4 weeks for schools to respond.

The reasons for this request to be made are as follows:

2. Funding transfers from the Schools Block to the High Needs Block have been permitted for a number of years and is the mechanism the majority of local authorities have followed in order to provide for increasing demands for support of pupils with special educational needs and disabilities. In 2019/20 Staffordshire County Council elected to make use of this power, authorised by the Secretary of State, for the transfer of circa £2.4m (0.5%). However, no further transfers have been made since that time.

In the Schools Operational Guide recently published, the Government has confirmed that this mechanism will again be available in 2024/25.

3. In Staffordshire, over the last few years the movements between blocks have been:

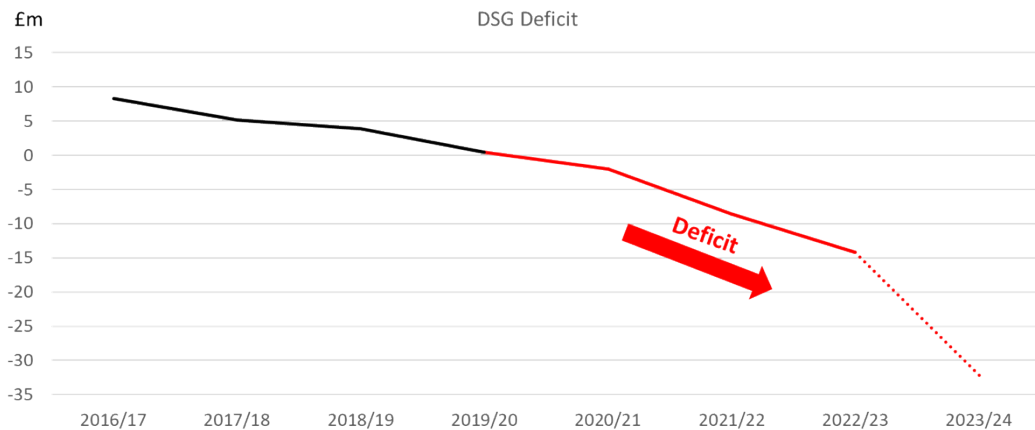
	2018/19 £m	2019/20 £m	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m
Schools	0.8	-1.6	0.6	1.1	0.7	0.0
Early Years						
High Needs		2.4				
Central	-0.8	-0.8	-0.6	-1.1	-0.7	0.0

In addition, Dedicated Schools Grant reserves have been utilised to support high needs expenditure as per the table below:

	2018/19 £m	2019/20 £m	2020/21 £m	2021/22 £m	2022/23 £m	2023/24 £m (forecast)
Contribution to High Needs	5.1	3.6	5.9	8.2	9.1	20.0

This has led to the level of reserves reducing from c£8m at 1 April 2017, to £14.2m **in deficit** as at 1 April 2023. Pressure on the reserves has been alleviated by underspends in other areas, otherwise the existing deficit would be significantly greater.

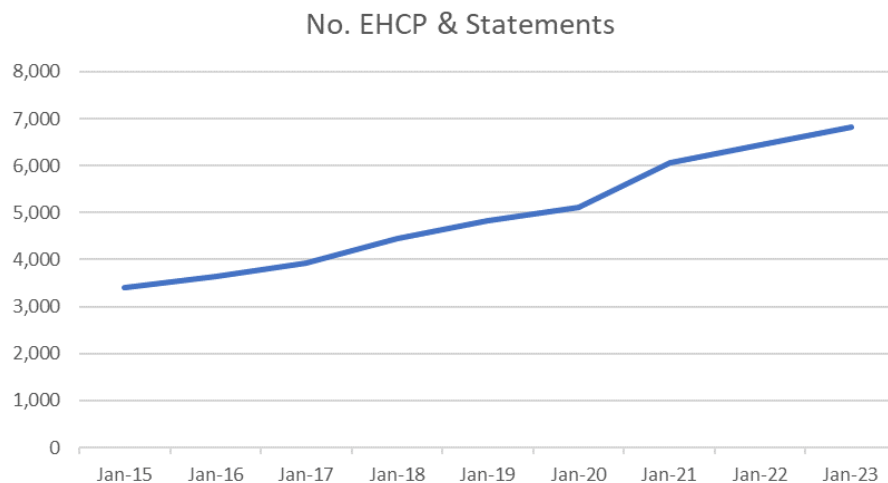
However, given the latest forecast overspend in High Needs for 2023/24 of £20m, it is expected that the DSG reserve will be over £30m in deficit at the end of the current financial year:



4. The pressures that led to these movements have been:

i. Numbers of children with SEND

There has been a significant increase in the number of children with SEND including the extension of support to young people up to the age of 25. This has resulted in the demand for both post 16 and post 19 provision rising considerably.



ii. Complexity of need

The needs of children with special educational needs and/or disabilities are becoming more complex and this is driving increased financial pressures across the system. There is increased demand for specialist educational provision to meet need, particularly in relation to Autism Spectrum Condition (ASC) and Social, Emotional & Mental Health (SEMH), and this is resulting in increased specialist placements with independent providers, some of which are located outside of the local area.

iii. Inclusiveness of the system

Mainstream schools report the increasing complexity of children's needs which is driving up the demand for more specialist education services. Many schools are facing financial pressures and do not feel they have the capacity to provide additional support to students.

We recognise that schools have pressures and difficulties in managing the support that pupils with high needs may present. The county council's SEND & Inclusion district model is working to deal with this by providing support and managing processes in a different way, but still recognising the funding constraints that schools and the local authority will need to deal with. In conjunction with this the local authority will be reviewing its own processes and procedures to ensure the optimum support continues to be given to schools.

iv. The SEND reforms

As well as the extension of support to cover children and young people aged 0-25, the reforms have raised the expectations of children, young people and their families. There is an expectation that young people will stay in education until they reach 25. Parental requests for specific high cost placements and tribunal decisions to support parental preference are further driving demands on the high needs block.

Over the previous five years, the number of pupils with EHCPs in Staffordshire has been increasing and has grown rapidly in recent years. In the 2023 SEN2 Census, there was a total of 6,830 EHCPs compared to 4,456 in 2018; an increase of over 50% in five years.

Budgetary pressures because of the SEND pressures

5. As with many other local authorities, Staffordshire is faced with a significant year on year overspend on the High Needs Block (HNB).

The Minimum Funding Guarantee continues to apply to special schools; for 2024/25 this has been set at between 0% and 0.5% (see High Needs Operational Guide 24/25) and means that school core funding levels next year (planned place plus top up elements) must increase by between 0% and 0.5% based on the same pupil numbers and profile of needs.

The increased demand for places within specialist provision through parental requests and SEND Tribunal decisions has resulted in an increase in pupils being placed in the independent specialist school sector. Over the last three years the number of children in this school population has doubled, with an average cost of approximately £60,000 per placement per annum. A contributing factor to this growth is SEND tribunal rulings which require the local authority to place children at these schools. The cost of an independent specialist placement can cost in excess of c £0.2m per pupil per annum and the overall cost in 2022/23 was £27.5m; up from £10m in 2018/19 and equivalent to a rise of more than 175% in just 4 years.

Schools report that, because of pressures on their budgets, due to a range of cost increases, including those for staffing, they find these pressures create difficulties in maintaining the notional SEND budget requirements. This is leading to a greater proportion of requests for EHC needs assessments.

6. This has led to the following changes in demand for special provision

Academic Year	Requests for EHC Assessments	EHC Assessments completed		Year	Total Number of EHCP & Statements
14/15	609	321		Jan 15	3,400
15/16	889	562		Jan 16	3,631
16/17	1,052	620		Jan 17	3,933
17/18	1,125	694		Jan 18	4,456
18/19	1,320	899		Jan 19	4,835
19/20	1,243	1,155*		Jan 20	5,117
20/21	1,244	688		Jan 21	6,056
21/22	1,622	724		Jan 22	6,437
22/23	1,960	907		Jan 23	6,830

* reflects additional assessments completed as a result of the backlog

Update on placement of pupils with EHCPs

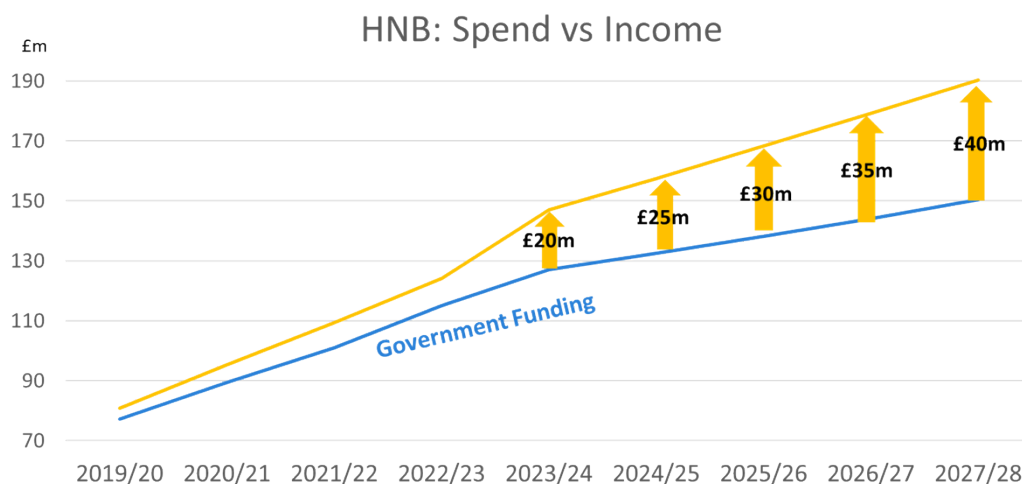
7. There were 6,830 young people in Staffordshire for whom the authority maintained an EHC plan at January 2023. The majority of these pupils were placed in special schools (maintained, academy and independent).

28% of young people aged 0-25 with EHC plans attend a state funded mainstream schools; this is notably below the national average of 38%. Of Staffordshire's statistical neighbours only Nottinghamshire has a lower percentage. At the same time 47% of young people with EHC plans are taught in special schools, compared to 35% nationally.

Staffordshire has the 2nd highest percentage of young people attending a special schools in comparison to statistical neighbours (with an average of 38%). The remaining young people are in further education or other specialist provision.

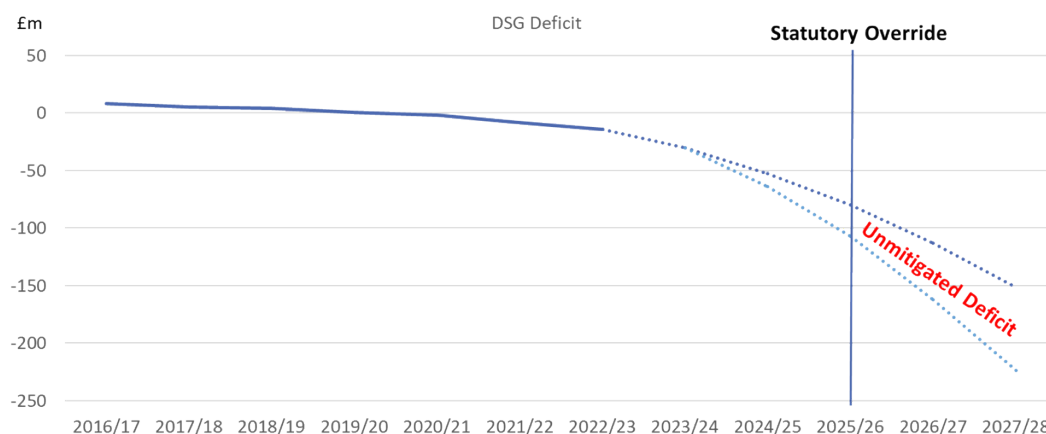
Financial Forecast

8. The latest financial forecast is that, in 2023/24, there will be an overspend of c £20m (there was no transfer from schools block this year). It is estimated that Staffordshire will receive c £132.5m HNB funding next year, around £5.5m extra compared to 2023/24 (c 4%). This is significantly below expected rises in demand and costs and – assuming similar funding rises going forward in line with Government forecasts - it is likely that going forward the current funding gap will continue to increase:



9. Staffordshire County Council is not alone in this difficult financial predicament – this is a position shared by the majority of Councils across the sector. The Government has put in place a 'statutory override' requiring that, up to 2025/26, accumulated DSG deficits should remain ringfenced separate to the Council's other reserves; it is unclear at this time how the Government will expect Local Authorities to manage accumulated deficits after that time.

10. This represents a significant financial risk to Staffordshire; given the forecast annual overspend outlined above, then we would expect the deficit to increase over the next 5 years and, by end of 27/28 to be c £150m - £225m in deficit:



SEND Strategy

11. The local authority has a strategic plan on how, over time, it intends to bring the High Needs Block to sustainable levels:

Developing Targeted Support

- The local authority is supporting the SEND & Inclusion district model which has created collaborative working between themselves and schools. As part of this project the LA, schools and other stakeholders, have established a locality based model - at a District level - enabling early intervention for the benefit of pupils who are identified as being in need.
- A further development of the Enhanced Assess-Plan-Do-Review (EAPDR) Pathway has been co-produced with schools, education settings, Parent Carer Forum, Health, Social Care and Educational professionals in order to support schools and educational settings with capacity to meet a child or young person's SEND needs by accessing the right support, in the right place, at the right time.

Collaborative Working

- The LA is working closely with independent providers, both existing and new, to identify cost effective provision for high needs placements that offers value for money and ensures good outcomes for pupils with SEND.
- Using the DfE SEND capital funding to create additional provision in Staffordshire special schools based on a detailed analysis of need, specifically in relation to social emotional mental health needs (SEMH) and Autism.
- A pre-statutory Staffordshire Enhanced District Inclusion Support Model (SEDIS) accessed via an Enhanced Assess-Plan-Do Review Pathway to provide mainstream educational settings with the resources and support to deliver the graduated response.

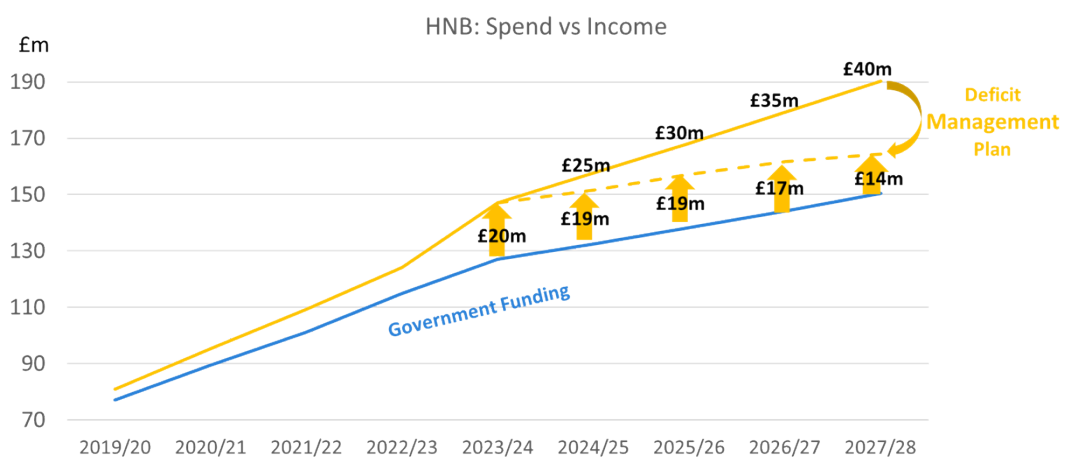
Partner Contributions

- The Council will continue to ensure a fair contribution is made from health and social care partners towards the cost of specialist places and provision where appropriate.

Deficit Management Plan

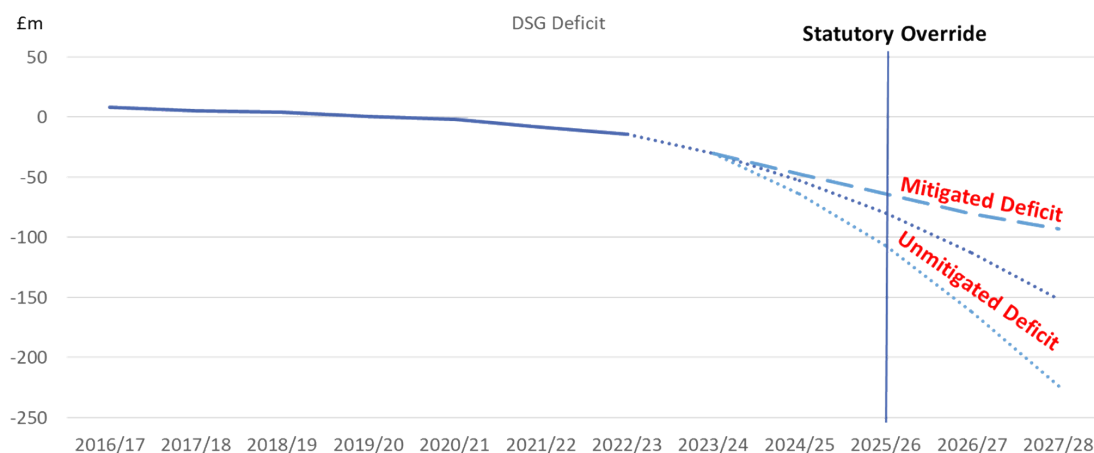
12. Given the extent of the annual HNB overspend, and accumulated DSG deficit, the Council is required to maintain a 'deficit management plan'. This is not only a requirement under the 'DSG: Conditions of Grant' but represents prudent financial management. We acknowledge activity detailed within the plan will take time; there is no quick fix, but the strategy is to first to address the annual overspend and then over a longer period to address the accumulated deficit.

13. The deficit management plan will mitigate – as far as possible - the funding gap which is expected to increase to c £40m by 27/28. This will require difficult decisions that impact on service delivery across all sectors including:
- fundamental to the strategy – and proposed deficit management plan – is the development over time of a more inclusive system where more of our children are educated and supported in our mainstream schools. By working with mainstream and special schools we will seek to provide the necessary support and capacity that will reduce the reliance on more expensive independent provision where this is not appropriate or necessary bringing the proportions of children educated within each part of the system in line with national proportions (target saving £18m by 2027/28).
 - the Council will review existing policy, non-statutory provision and consider alternative delivery and funding options that could reduce the pressure on HNB (target saving c £4m by 2027/28)
 - the Council has put in place significant additional investment of c £3m to support a locality based model - at a District level - enabling early intervention for the benefit of pupils who are identified as being in need. This is essential to enable the long term changes outlined above but is an additional pressure on existing scarce/overstretched HNB resources.
 - Despite the above actions and projected savings, this does not address the HNB overspend and bring it into balance. As a result, it is anticipated that, as part of the deficit management plan, the Council will request – annually – a 0.5% transfer from schools block to high needs block until such time that required strategic and cultural changes have impacted and a more sustainable model has been realised.



The above represents a difficult challenge and there is a significant risk that some of the savings will not be delivered in full; however – and even if the target savings are brought to fruition – then we would still anticipate a significant year in year overspend and the accumulated DSG deficit will continue to deepen albeit at a slower rate. It is essential the Council continues to lobby Government

to ensure there is a sustainable funding model going forward that recognises the continuing increase in demand:



Assessing the likelihood of a further request in 2025/26

14. As much of the HNB funding is committed to pupils and students in the system, the only opportunity of recovery is when the young person leaves the statutory system or there are reductions in costs as a result of a review. Therefore, recovery has to be phased over a number of years.
15. Whilst the Government has provided for significant additional funding over recent years, this has failed to keep pace with the growing demand and complexity of need. Going forward there is a significant risk that annual rises in Government funding will slow down and that the funding gap will widen further.
16. The continuing implementation of the SEND strategy is expected to reduce pressures in this area over time, however this is unlikely to have a significant impact in the short term. Given the level of uncertainty, and existing deficit position that is likely to further increase over the coming years, the 0.5% funding transfer from schools block to high needs block forms a key part of the Council's deficit management plan and it is therefore likely that there will be need for a request of a further switch in the following year and going forward (subject to Government permissions).

Impact on Individual school budgets

17. The total amount that would be top sliced would be determined by the 2024/25 allocations confirmed in December 2023. Based on latest forecasts, it is expected that this would be in the region of £3.2m.
18. The Schools Operational Guide 24/25 requires local authorities to set a Minimum Funding Guarantee of between +0% and +0.5%. This means on a per pupil basis, the schools' individual budgets will increase by at least 0% - 0.5% even with this funding switch.

Consultation

19. In order to make a transfer from the Schools Block to the High Needs Block, it is a statutory requirement that local authorities consult with all local mainstream schools and academies and that the Schools Forum should take into account the views of the consultation response before giving their approval. The survey will only take a few minutes to complete and is available here:

<https://forms.office.com/e/vk3JEBVZnn>

- **This survey is for mainstream schools only (Maintained and Academy) – please complete only one response per school**
 - The survey will be open until 5pm 13 October 2023

Appendix 3: High Needs Block 0.5% Transfer Consultation Results

Do you agree with the Local Authority's proposal to transfer 0.5% (estimated to be in the region of £3.2m) from the Schools Block to the High Needs Block to support the financial pressures being experienced in supporting pupils with high needs?

Phase	Yes	No
First	0	5
Primary	4	8
Middle	0	3
High	0	1
Secondary	4	13
Total	8	30
Percentage of responses	21%	79%

The response rate for the consultation was very low at 10.2% (38 schools responded out of 373).

Key themes from the supporting comments:

Agreeing with the proposal

- An absolute necessity to support the most vulnerable.
- These pupils deserve the extra funding.
- High needs has exploded. Something needs to be done.
- Much needed.

Disagreeing with the proposal

- Schools cannot afford for this funding to be taken out of their budgets.
- Schools are facing the real prospect of deficit budgets due to factors outside their control. Schools need to receive the maximum funding to which they are entitled.
- Taking money from one area to mitigate problems in another only masks the overall funding issue in the education sector. We need to make the problem obvious to government.
- I cannot see any hope that taking money from schools would do anything other than pass the deficit onto individual schools. Possibly the LA need to consider having some LA run special schools to cut the cost of private funding.
- Pressures in mainstream schools with regards to children with SEND mean we need an increase in our budget not have monies removed from us.
- Schools are underfunded enough. The government needs a spending review that is robust and plans for the number of pupils who are now requiring additional needs.

Schools Forum Work Programme

There are a number of items the Schools Forum considers annually; these are set out in the work programme below.

The "Schools Forums: operational and good practice guide" (October 2013) states that:
Local authorities should as far as possible be responsive to requests from their School Forums and their members. Schools Forums themselves should also be aware of the resource implications of their requests.

Forum Members are therefore able to suggest an item for consideration at a future Forum meeting as long as it is within the remit of the Forum. Any request must be agreed by the Schools Forum before being included on the work programme. Each Forum agenda is set by the Chairman in consultation with the Director and the Clerk. The scheduling of items included on the work programme will therefore be agreed through this process and taking account of resource implications and agenda management.

Meeting	Item	Details
P 20 103 Spring Term 18 January 24	Notices of Concern and Licensed Deficit Agreements	Standard item
	Update to the Staffordshire Scheme for Financing Schools & Procurement Regulations	General update if required
	Schools Budget Update	Standard item
	High Needs Block including Deficit Management Plan and Education Banding Tool	Standard item

Meeting	Item	Details
Spring Term 21 March 24	Notices of Concern and Licensed Deficit Agreements	Standard item
	Update to the Staffordshire Scheme for Financing Schools & Procurement Regulations	General update if required
	Schools Budget Update	Standard item
	High Needs Block including Deficit Management Plan and education Banding Tool	Standard item

Meeting	Item	Details
Summer term 11 July 2024	Notices of Concern and Licensed Deficit Agreements	Standard item
	Update to the Staffordshire Scheme for Financing Schools & Procurement Regulations	General update if required
	Growth Fund Allocation 2023/24	Standard item
	Schools Budget 2022/23 Final Outturn	Annual item
	High Needs Block including Deficit Management Plan and Education Banding Tool update	Standard item

Meeting	Item	Details
Autumn Term 7 Oct 24 Page 104	Notices of Concern and Licensed Deficit Agreements	Standard item
	Update to the Staffordshire Scheme for Financing Schools & Procurement Regulations	General update if required
	Primary Behaviour Support Services – 2025-26 Financial Year	Annual item
	Minority Ethnic Achievement Service (MEAS) 2025-26 Financial Year	Annual item
	Schools Budget 2024-25: De-delegation, Central Expenditure and Education Functions.	Annual item
	High Needs Block including Deficit Management Plan and Education Banding Tool update	Standard item

Meeting	Item	Details
Spring Term XX January 25	Notices of Concern and Licensed Deficit Agreements	Standard item
	Update to the Staffordshire Scheme for Financing Schools & Procurement Regulations	General update if required
	Schools Budget Update	Standard item
	High Needs Block including Deficit Management Plan and Education Banding Tool	Standard item

Meeting	Item	Details
Spring Term XX March 25	Notices of Concern and Licensed Deficit Agreements	Standard item
	Update to the Staffordshire Scheme for Financing Schools & Procurement Regulations	General update if required
	Schools Budget Update	Standard item
	High Needs Block including Deficit Management Plan and education Banding Tool	Standard item

Meeting	Item	Details
P802 105 Summer Term XX July 25	Election of Chair and Vice Chair	Every two years
	Membership update	General update if required
	Notices of Concern and Licensed Deficit Agreements	Standard item
	Update to the Staffordshire Scheme for Financing Schools & Procurement Regulations	General update if required
	Growth Fund - Allocation Funding 2023/24	Standard item
	Schools Budget 2022/23 Final Outturn	Annual item
	High Needs Block including Deficit Management Plan and Education Banding Tool update	Standard item

Meeting	Item	Details
Autumn Term X November 24	Notices of Concern and Licensed Deficit Agreements	Standard item
	Update to the Staffordshire Scheme for Financing Schools & Procurement Regulations	General update if required
	Primary Behaviour Support Services – 2024-25 Financial Year	Annual item
	Minority Ethnic Achievement Service (MEAS) 2024-25 Financial Year	Annual item
	Schools Budget 2024-25: De-delegation, Central Expenditure and Education Functions.	Annual item
	High Needs Block including Deficit Management Plan and Education Banding Tool	Standard item

Pending	
County Council Redundancy Policy	When there is something to report