



## LINCOLNSHIRE SCHOOLS' FORUM 19 JANUARY 2023

### **PRESENT: GAVIN BOOTH (CHAIRMAN)**

Amy Stancer (Headteacher, St Giles Nursery School, Lincoln), Kyna Adkins (Head Teacher, St Christopher's Special School), Alan Howe (Governor, Sutton on Sea County Primary School), Anthony Stevens (Governor, The Holt Primary School, Skellingthorpe), Callum Clay (Head Teacher, Church Lane Primary School, Sleaford), Catherine Stratton (Head Teacher, Saxilby Church of England Primary School), Rachel Barrett FCCA (Governor, North Kesteven Academy), Professor Ken Durrands CBE (Governor, The King's School, Grantham), Jo Slessor (Governor, Carres Grammar School, Sleaford), Steve Baragwanath (Executive Principal, University Academy Holbeach), Katie Grivil (Head Teacher, Kirkby la Thorpe Church of England Primary Academy), Lea Mason (Executive Head Teacher, Lincolnshire Wolds Federation, Louth), Josh Greaves (Deputy Chief Executive Officer, Wellspring Academy Trust) (Vice-Chairman) and Julia Merivale (Manager, Trinity Day Nursery)

Officers in attendance:-

Mark Popplewell (Head of Finance – Children's Services), Emily Wilcox (Democratic Services Officer), Kate Capal (Head of Service – Inclusion), Geraldine O'Neill (Sustainability and Development Manager), Geraldine Willders (Head of Service – School Strategy), Tony Warnock (Head of Financial Services), Martin Smith (Assistant Director – Children's Education), Elizabeth Bowes (Strategic Finance Manager)

### 1 APOLOGIES FOR ABSENCE/REPLACEMENT MEMBERS

Apologies for absence were received from Michele Anderson, Frances Green, Simon Pickett, Simon Morley and Andrew Watts.

### 2 DECLARATIONS OF MEMBERS' INTEREST

There were no declarations of interest.

### 3 MINUTES OF THE MEETING OF THE LINCOLNSHIRE SCHOOLS' FORUM HELD ON 6 OCTOBER 2022

RESOLVED:

That the minutes of the meeting held on 6 October 2022 be approved as a correct record.

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**4**      CHAIRMAN'S ANNOUNCEMENTS

There were no announcements by the Chairman.

**5**      SCHOOL FUNDING ARRANGEMENTS 2023/24

Consideration was given to a report by the Strategic Finance Lead – Children's Services, which invited the Forum to consider the School Funding Arrangements for 2023/24 and agreement was sought by the Forum to the Local Authority's (LAs) proposals to a number of centrally held budgets.

A supplementary report had been circulated to the members of the Forum prior to the meeting, which provided a mainstream schools update paper on adopting the National Funding Formula for 2023/24 and the measures to address the affordability gap.

The Forum was advised of the background to the national funding formula; the Government's funding intentions for 2023/24, announced on 20 July 2022 and then subsequently updated on 16 December 2022. It was noted that the 2023/24 school funding levels were set to rise by £1.5bn to £55.3bn or a 1.9% increase in per pupil funding. The Autumn 2022 statement announced a further £2bn increase in funding in each of 2023/24 and 2024/25 to respond to increasing costs faced by schools, particularly through staff pay awards and utilities. For Lincolnshire mainstream schools, this new grant equates to an additional 3.4% increase in per pupil funding.

The Strategic Financial Lead also outlined the details of other school funding announcements that included: 2023/24 Dedicated School Grant (DSG) allocations, the pupil premium announcements, universal infant free school meals, the Mainstream School Additional Grant (MSAG), other funding blocks such as the Central Schools Services block, High Needs block and Early Years block, and the financial outlook for the Council.

The fundamentals principles of the Government's NFF were not changing for 2023/24. The key NFF updates for 2023/24 were shown on page 22 of the report. It was noted that for the DSG School Budget for 2023/24, the LA was to continue adopting the NFF in 2023/24, subject to affordability. The October 2022 schools census which was used for 2023/24 mainstream schools budgets had continued to see significant growth in both Free School Meals (FSMs) and FSMs Ever 6 with the cost of living challenges being a contributing factor to this.

The supplementary paper explained the overall affordability gap shortfall was £2.656m to adopt the NFF in full including a 0.5% minimum funding guarantee (MFG). The LA was unable to set an affordable formula, the LA would therefore continue to adopt the same principles for 2023/24 when addressing affordability issues of the Schools block. The following steps were applied: to reduce the growth element of Schools block budget by £1.934m; a budget transfer of £0.495m from available funds within the Central Schools Services block, which

required Schools' Forum support, and the remaining £0.227m shortfall was to be addressed through a downward adjustment of 0.075% of the Key Stage Age Weighted Pupil Unit (AWPU) values from the Government's NFF rates in 2023/24. Appendix A also provided a funding comparison of the NFF factors for 2022/23 to 2023/24.

It was reported that the LA had conducted its annual review of the DSG central budgets, and areas of refinements were focused on the demand-led budgets within the High Needs block. It was noted further that the affordability for all the blocks of the DSG would be finalised over the coming weeks.

Table 2: Budgets requiring Schools Forum decisions – Schools Block; Table 3: Budgets requiring Schools Forum decisions – CSSB ongoing commitments; and Table 4: Budgets requiring Schools' Forum decisions – CSSB historic commitments were detailed on pages 24 to 28 of the report. The Forum considered the three tables presented.

The Forum were asked to consider and comment on the main report and supporting paper relating to the NFF and to support the approaches to addressing the affordability gap to adopt the NFF, and to support the Central Schools Services block transfer of £0.495m to the Schools block. The Forum were also asked to approve the budgets as detailed in Tables 2 to 4 of the report, accordance with DfE regulations.

The following comment was raised:

- The Forum was advised that two other options had been considered for addressing the affordability gap in the NFF, which were to reduce the MFG to 0% from +0.5%, however this would have realised minimal savings, and the introduction of a ceiling cap for schools who had seen an increase in funding, but this would have impacted those schools seeing an increase in pupil deprivation levels.

RESOLVED:

1. That the report be noted;
2. That the proposals relating to several centrally held budgets, as below and as referenced in in the report, be agreed.
  - a. Support the LAs proposals relating to the measures to address affordability of mainstream schools NFF:support the Central Schools Services block transfer of £0.495m to the Schools block, and
  - b. support the approaches to addressing the remaining affordability gap through the Schools Growth funding, and the AWPU funding being -0.075% below the Government NFF values when adopting the NFF for 2023/24.

## 6 EARLY YEARS NATIONAL FUNDING FORMULA

Consideration was given to a report by the Sustainability and Development Manager – Children's Education, which provided a summary of the Early Years National Funding

Formula for 2023/24 and details the funding distribution for early years providers in Lincolnshire in 2023/24.

With reference to the report, the Sustainability and Development Manager – Children's Education provided details of National Funding to Local Authorities for Early Years Core Funding which would be issued to Providers and Schools, including details of the local universal base hourly rate per pupil; details of the supplements available to providers, including the deprivation supplement; the SEN inclusion Fund; Fluctuation Contingency Fund, Local Authority Centrally Retained Funding; Lincolnshire's Early Years Funding Distribution for 3 and 4 year olds; Disability Access Funding (DAF); Early Years Pupil Premium (EYPP); 2 Year Old Funding and Lincolnshire's Early Years Funding Distribution.

The DfE had published the final budgets on the 16th December 2022, which was later than planned. All associated technical notes and operational guidance had been reviewed and used to implement the funding changes for the next financial year.

The local authority's rate would be £4.87 per hour, which was a 23p increase on the current rate of £4.64. This rate included the teachers' pay and pension grant (TPPG) which was previously allocated through a separate grant allocation. Lincolnshire continues to be funded on the lowest funding rate. Lincolnshire was one of 35 Local Authorities funded at the minimum level.

Lincolnshire's hourly rate was £4.90 without protections or gains caps applied. Lincolnshire's hourly rate has been reduced by £0.03 per hour due to the Government's enforcement of a ceiling cap of 4.9%.

This was recognised as disappointing for Lincolnshire. Colleagues within the local authority had the opportunity to raise these concerns directly with the Early Years funding division at the DfE.

Lincolnshire would continue to receive supplementary funding for the Maintained Nursery Schools (MNS) and local authority colleagues would work with Lincolnshire MNS' to agree the distribution of supplementary funding amounts for next year.

There had been an increase from 10% to 12% of the total value of funding for 3- and 4- year old's to go through supplements. This was to take account of the TPPG being included in the formula.

A summary of the background information that supports the theory within the formula was explained.

Centrally retained funding was proposed as £1.627m, which was an increase of £66,000 to reflect the current and forecast pay in 2023/24 for the Early Years and Childcare Support team. This included the pay award and maintenance costs for the system used to provide monthly payments to providers. This represented 4.39% of the overall planned early years funding and was below the threshold of 5%.

An explanation detailing the breakdown of all the elements within the 3&4 year old funding and the equivalent hourly rate was provided. This provided pass-through funding of 95.61% to providers in 2023/24 (this was 95.77% in 2022/23).

The value of all supplements was 5.08%, which was below the 12% threshold.

2-Year-Old Funding had increased by £0.06p per hour to £5.63 per hour per child from central Government. Lincolnshire's indicative allocation for 2023/24 was £4.947m using the January 2022 census data.

The Local Authority had retained funding for a contingency fund before determining the funding rate to providers to avoid overspends occurring on this budget. An annual budget of £0.249m was required, which represented 5.09% of the overall budget.

There was a growing concern across the childcare sector regarding funded education investment, particularly with the cost-of-living rises. The Local Authority recognises the financial demands placed on the early years sector through increased costs and has applied a rate increase from the Government's financial settlement to support this.

Consideration was given to the report and during the discussion the following points were noted:

- There continued to be a high level of take up for early years funding support. At the end of the term for Autumn 2022, 84% of 2 years olds were accessing places with support from early years funding, however the number of people accessing support fluctuated throughout the year. It was noted that the number of children eligible for early years support was decreasing on a national scale.
- The Forum thanked the team for their work in producing the formula.
- The Forum emphasised the difficulties many families faced in raising fees for nursery places, particularly those in deprived areas. The Forum was reassured that the Council continued to make representation to the Department for Education who were communicating on this issue.
- Concerns were raised over the cost impact to early years settings on providing additional support to children with special educational needs. Officers had acknowledged the cost impact and a detailed consultation exercise was planned to provide clarity on what additional costs were and where funding could be best distributed.

RESOLVED:

1. That the report be noted;
2. That the Local Authority's proposals for centrally retained funding be agreed.

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**7**      SCHOOLS SECTOR LED UPDATE

Consideration was given to a report by the Head of Service for School's Strategy – Children's Education, which provided an update on the sector led system over the past 12 months since the previous report.

With reference to the report, the Head of Service for School's Strategy – Children's Education provided further detail of the outcomes for recent Ofsted inspections; Statutory National Curriculum Assessment and Examinations; Early Years checks (Aged 5), Phonics Screening checks (Aged 6), Key Stage 1, Key Stage 2 and Key stage 4 data; a data summary, details of the Lincolnshire Learning Partnership (LLP) and the L.E.A.D. Teaching School Hub Lincolnshire.

RESOLVED:

That the report be noted.

**8**      ACADEMIES AND TRUST UPDATE

Consideration was given to a report by the Strategic Finance Lead – Children's Services, which provided the Academies and Trust Update.

It was noted that since effective date of the last report (1 September 2022), no further schools had become academies. And that using the latest pupil figures, 78,965 (72.5%) FTE pupils were educated in academy schools or 52.1% of schools.

Further to the report, it was noted that there were no schools were going through the process to become an academy within the next six months.

RESOLVED:

That the report be noted.

**9**      LINCOLNSHIRE SCHOOLS' FORUM - WORK PROGRAMME

The Forum was provided with an opportunity to review its work programme.

RESOLVED:

That the report be noted.

The meeting closed at 2.35 pm