



**LINCOLNSHIRE SCHOOLS' FORUM  
29 JUNE 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), Michele Anderson (Head Teacher, Spalding High School), Professor Ken Durrands CBE (Governor, The King's School, Grantham), Jo Slesser (Governor, Carres Grammar School, Sleaford), Steve Baragwanath (Executive Principal, University Academy Holbeach), Katie Grivil (Head Teacher, Kirkby la Thorpe Church of England Primary Academy), Dr Stephen Hopkins (Trust Chair of Communities Inclusive Trust), Josh Greaves (Deputy Chief Executive Officer, Wellspring Academy Trust), Peter Tomlinson (Diocesan Business and Operations Manager, Diocese of Lincoln), Andrew Everard (Chair of Governors, University Academy Long Sutton) and Chris Fitzpatrick (Head Teacher, Tall Oaks Academy Trust)

Officers in attendance:-

Elizabeth Bowes (Strategic Finance Manager, Schools Finance Team), Mark Popplewell (Head of Finance (Children's Services)), Martin Smith (Assistant Director for Children's Education), Emily Wilcox (Democratic Services Officer), Sara Gregory (Interim Commissioning Manager, Children's) and Geraldine O'Neill (Lead Consultant - Early Years Entitlement)

1 ELECTION OF CHAIRMAN

It was proposed, seconded and

RESOLVED:

That Gavin Booth be elected as the Chairman of the Lincolnshire Schools' Forum for 2023/24.

2 ELECTION OF VICE-CHAIRMAN

It was proposed, seconded and

RESOLVED:

That Josh Greaves be elected as the Vice-Chairman of the Lincolnshire Schools' Forum for 2023/24.

**2**  
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**3**      APOLOGIES FOR ABSENCE/REPLACEMENT MEMBERS

Apologies for absence were received from Callum Clay, Simon Pickett, Philip Dickinson, Lea Mason, Josh Greaves and Andrew Watts.

**4**      DECLARATIONS OF MEMBERS' INTEREST

None were declared.

**5**      MINUTES OF THE PREVIOUS MEETING HELD ON 20 APRIL 2023

RESOLVED:

That the minutes of the meeting held on 20<sup>th</sup> April 2023 be approved as a correct record.

**6**      LINCOLNSHIRE SCHOOLS' FORUM - CONSTITUTION AND MEMBERSHIP UPDATE

Consideration was given to a report by the Strategic Finance Lead – Children’s Services, which provided an update on the Lincolnshire Schools’ Forum Constitution and Membership Document, as set out at Appendix A.

No changes have been made to the Schools’ Forum (England) Regulations 2012 or the Schools and Early Years Finance (England) Regulations (2023) that would require a change to the current operating framework to the Forum. The membership composition has been reviewed and updated to reflect the current position (1 June 2023) and a forward plan of proposed membership from October 2023 of maintained and academy schools based on the January 2023 census data, as set out at Appendix A. The school membership composition remains unchanged for 2023/24. Only two additional academy conversions have taken place in that time within the mainstream sector. The Terms of Reference document at Appendix A has been updated to reflect the annual review on the composition of membership, and the Executive Councillor for Children's Services will be briefed of this position.

The Forum was advised that specific Schools’ Forum training guidance would be updated and available in Autumn 2023 and would be shared with members of the Forum when complete.

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

- The Chairman sought members views on the location of the meetings, and whether there was a preference for some in person meetings rather than all virtual meetings as currently operated. Following a discussion, it was agreed that the Democratic Services Officer engage with members of the Forum to seek their preferences on the

location, time and day of future meetings prior to agreeing plans for future meetings with the Chairman.

- It was suggested that presentations for noting and regular reports be kept as brief as possible to help time management. However, acknowledgement was made to differing levels of experience in this area, and the need for detailed presentation, such as with new areas of content or areas of high interest, or for decision making reports was recognised.

RESOLVED:

1. That the report be noted;
2. That the updated Constitution and Membership document, including the annual review of composition membership, be endorsed.

#### 7 IMPLEMENTING THE DIRECT NATIONAL FUNDING FORMULA - GOVERNMENT CONSULTATION OUTCOMES

Consideration was given to a report by the Strategic Finance Lead – Children’s Services, which provided an update on the Government consultation response publication to Implementing the Direct National Funding Formula (NFF), detailing the questions and outcomes of the consultation from the Summer 2022 consultation.

The Forum was advised that the Government had introduced measures in 2023/24 to move more Local Authorities towards the ‘direct’ NFF. This did not impact Lincolnshire’s mainstream schools as the Council currently adopted the NFF. The Government would announce the 2024/25 NFF settlement for Schools and High Needs in July 2023, which would confirm the Governments requirements on Local Authorities to bring their local funding formula closer to the NFF in 2024/25. Local Authorities would continue, for now, to be responsible for agreeing and calculating schools funding allocations.

The key outcomes of the consultation focused on:

- Interaction between high needs and schools funding, and block transfers;
- Indicative SEND budgets;
- Schools Growth funding, and
- Implementing a national split site factor.

The Council would continue to engage with the Department for Education (DfE) on these proposals and any future developments including responding to Government consultations to ensure Lincolnshire schools were represented and protection against changes were in place. Officers emphasised the importance of retaining local flexibility and decision-making powers.

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

- Schools were always encouraged to review consultation questions and respond to them with their own views, which were counted in terms of the overall summary provided by the DfE.
- Officers welcomed the additional funding that could be gained through the NFF but highlighted a concern with the lack of local flexibility that had been removed from the formula. The Council would continue to engage with the DfE over coming years to ensure that the formula was fit for purpose for Lincolnshire.
- The question related to the next agenda item (Section 251), whereby 23% of High Needs block funding is not being devolved out to Lincolnshire schools with funding budgeted for meeting education costs of external specialist placements where needs could not be met within Lincolnshire mainstream or special schools; outreach arrangements and central support budgets.
- There was no specific funding allocation for special schools in financial difficulty within the Section 251 line. Support through for special schools in financial difficulty would be subject to exceptional arrangements. In Lincolnshire, maintained special schools would be considered through the Local Authority monitoring and intervention protocol, which provides assistance from key Local Authority departments to recover its financial deficit and address challenges. It was also noted in the discussion that it is good practice to review a funding formula periodically to ensure it remains fit for purpose and delivers fair funding to schools.
- The Forum acknowledged the uncertainty in terms of future cost rises and the importance of ensuring that financial funding was sufficient.

RESOLVED:

That the report be noted.

#### 8 SECTION 251 BUDGET STATEMENT 2023/24

Consideration was given to a report by the Strategic Finance Manager – Schools Finance Team, which provided a copy of the Section 251 (s.251) budget statement for the 2023/24 financial year.

The budget allowed all maintained schools and academies to have an oversight of how budgets had been set for the financial year and the overall Dedicated Schools Grant (DSG) funding was considered in completing the annual detailed budget setting exercise.

The report referenced details of the funding blocks, noting that the only block transfer the Local Authority had made for 2023/24 related to a £0.495m movement from available monies in the Central Schools Services Block (CSSB) to the Schools Block to enable Lincolnshire to continue to adopt the Government's mainstream schools' national funding formula factors and monetary values (except for the Age Weighted Pupil Unit value). The

transfer to the Schools block was required to meet the additional cost from an increase in Free School Meal eligibility due to the pandemic and received support from the Forum in January 2023. The total DSG for 2023/24 was £725.869m and further details could be found within the report.

The Forum were further advised that 99.87% of the Schools block was devolved to schools in the original budget shares publication; 96.18% of the Early Years block is allocated to the sector through participation-led driven funding with the remainder supporting statutory duties, and the High Needs block is earmarked to devolve out to Lincolnshire schools with the remainder supporting external placements, outreach arrangements and central support services.

Officers would continue to review the Government's publications that implicated 2023/24 funding including updates to the DfE's School and Early Years Finance Regulations, to ensure full compliance was achieved in 2023/24 and in future years.

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

- SEND provision was recorded within the budget for 'Top up and other funding – non-maintained and independent providers'. Costs of independent school placements for 2022/23 were £16.779m and there were 221 young people in independent special schools and 87 with Education, Health and Care (EHC) plans in independent settings which were non-special schools.
- The Forum highlighted their concerns over continued rising costs and budgetary pressures within schools. Officers assured the Forum that they would continue to engage with the Education and Skills Funding Agency regarding overall funding levels and identifying those key areas of cost increases.

RESOLVED:

That the report be noted.

## 9 ANNUAL REPORT ON SPECIAL EDUCATIONAL NEEDS AND DISABILITIES (SEND)

Consideration was given to a report by the Assistant Director, Education, which invited the Forum to consider and comment on the annual report for SEND, which included an update on SEND both nationally and within Lincolnshire and an overview of the high needs costs illustrating increasing pressures on the High Needs Budget. Details of funding streams and allocations were provided within the report.

The Forum noted that overall number of EHC plans increased in Lincolnshire by 6.5% compared to a 9% increase nationally. Also, requests for assessment and the number of new EHC plans issued in 2022 had not grown in Lincolnshire, contrary to national trends. Nevertheless, the cost of support for young people with EHC plans continued to rise significantly. A supplementary report would be provided at the October 2023 Schools'

Forum, would provide a more detailed analysis of those who have EHC Plans, where they receive support, their experience in education and their outcomes.

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

- The work of the SEND transformational group included tasks and finish group and other projects. Transformational work had been ongoing for around three years, and it was hoped that it would be completed within the next three to four years to contribute to the development of a sustainable plan.
- Conversations between the Integrated Care Board (ICB) and the NHS on funding support for children were ongoing. The ICB were aware of the financial pressures faced and the need to fully integrate and support work in SEND systems. It was suggested that the Designated Clinical Officer for the ICB be invited to attend the next meeting of the Forum to provide an update on this area.
- Assurance was provided that the shortfall in places for SEND pupils is being addressed through the expansive SEND capital programme in creating new places, along with other such strategies of step down from Independent Non-Maintained Special INMS and special schools to mainstream schools. Officers were working with special schools to continue to ensure that they could meet the needs of children within special schools. Despite significant price rises in INMS places the Council duty remained to place. Consideration would be given to the best value placement and the most appropriate, and understanding was given to the complexity of cases and the need for confidence and understanding from all partners.
- A key part of the health work stream was to address large scale issues and recognise key needs for special schools as a matter of urgency, which would include addressing the clinical duties carried out by teaching assistants with general mainstream job descriptions.

RESOLVED:

1. That consideration be given to the report and the comments made be recorded.
2. That it be noted that a supplementary report would be shared with the Forum in Autumn 2023.

## 10 EARLY YEARS ANNUAL REPORT

Consideration was given to a report by the Sustainability and Development Manager, which provided an update on support provided to the early years and childcare sector during 2022/23 and outlined the priorities for the service for 2023/24.

The report updated the Forum on the progress against each of the key priorities in the Early Years and Childcare Support Service in 2022-23 and detail behind the following priorities identified for the Early Years and Childcare Support Service for 2023-24 were outlined:

1. Spring budget announcements, including the expansion of childcare support for working parents to include children from 9 months old up to school age, and changes to Universal Credit childcare payments.
2. Team structure to meet demands, with the introduction of the new Government entitlements, and developing new childcare to support the national expectations to introduce or expand childcare provision on either side of the school day from 8am – 6pm.
3. Start for Life Strategy. The existing Early Childhood Strategy will be reviewed and developed to ensure this strategy was developed in collaboration with all partners involved in the Family Hubs programme and Start for Life offer.
4. Continuing Professional Development around 0-2 years. There will be a need to invest in the development of the workforce to support the 1,001 critical days and Lincolnshire's Start for Life offer.
5. SEN & Communication – The need for a stronger qualified workforce to meet the needs of children with SEND and communication needs.
6. Consideration will be made on the use of the Early Years block underspend identified from 2022-23 (£0.800m), to support the sector to deliver better outcomes for children in Lincolnshire. Of this sum, £0.200m had been earmarked against the fluctuation contingency fund for 3- and 4-year-olds in 2023/24, as the Local Authority looked to maximise the hourly rate to providers. Consideration would be made in the October Schools' Forum Revised Budgets report on the use of the underspend.

Lincolnshire received Secretary of State approval for the Disapplication request to capitalise £0.780m of DSG revenue funding to support childcare place sufficiency.

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

- A DfE grant funded scheme for a family hubs programme had been agreed with a specific delivery plan and conditions. It was explained that the January 2023 Early Years report provides an in depth explanation of the Early Years block and decision made by the Forum on centrally-agreed budgets
- The Forum acknowledged the increased expectation on delivery of early years education and the amount of wraparound support provided, as well as capacity. The Government wanted to ensure sufficient, and sustainable childcare support could be provided by high qualified members of staff within early years. The Council would be looking to learn from the pathfinder scheme and would be exploring the current capacity and options for the recruitment and retention of staff. A scoping exercise had begun which would provide a high-level analysis of the number of children of working families that would require additional childcare places to assess need.
- The expansion of childcare support for working parents to include children from 9 months old up to school age would be rolled out in phases so it was felt it would be manageable.

RESOLVED:

1. That the report be noted;
2. That the priorities for 2023-24 be agreed.

#### 11 PORTAGE SERVICE

Consideration was given to a report by the Commissioning Manager – Children’s Strategic Commissioning, which provided an overview of the findings from the review of the Portage Service and sought support from the Forum on the recommendation to re-commission a Portage Service and to continue its funding from the High Needs Block of the DSG.

Following a review of the Portage Service, it would be recommended to re-commission to one-provider led Portage Service via an expression of interest process to Lincolnshire special schools within the Lincolnshire SEND Alliance, which would ensure that special school expertise can continue to be utilised to provide Portage support for eligible children in their early years up to the age of five years, and their families. The recommended model will ensure staffing and funding resources were needs-led and will provide an equitable offer for all eligible families across the County. It would also provide the opportunity for more integrated working and seamless pathways between services in order to support eligible young children, and their parents/carers to access the right support, at the right time.

The Forum considered the report and were supportive of the continuation of a necessary service for children.

RESOLVED:

1. That the report be noted
2. That the recommendation to the Executive Councillor for Children’s Service, Community Safety, Procurement and Migration to continue to fund a Portage Service from the High Needs Block of the Designated Schools Grant be supported.

#### 12 ACADEMIES AND TRUST UPDATE

Consideration was given to a report by the Strategic Finance Manager – Schools Finance Team, which provided an update on the latest position regarding the number of Maintained Schools and Academies and the pupils in academies, and academy trusts, as detailed within the report.

Since the last report, Wrangle Primary School had applied to become an academy and to join University of Lincoln Academy Trust.

Digby Church of England School, Willoughby St Helena's Church of England Primary School, Skegness The Richmond School and Cowbit St Mary's (Endowed) Church of England Primary School are the schools that are required to become academies, but no trusts had yet been allocated.



There had been no changes trust changes since the last report.

RESOLVED:

That the report be noted.

13 LINCOLNSHIRE SCHOOLS' FORUM WORK PROGRAMME

The Forum were invited to consider the current work programme.

It was noted that the work programme would be updated once meeting locations/dates had been agreed.

14 FUTURE MEETING DATES

Future meeting dates would be agreed with the Chairman and circulated to the Forum once feedback on location and time of meetings had been received.

The meeting closed at 2.37 pm

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