

REPORT REFERENCE: **2.0**



LINCOLNSHIRE SCHOOLS' FORUM
9 FEBRUARY 2010

**PRESENT: TERL BRYANT (CHAIRMAN), (GOVERNOR, STAMFORD QUEEN
ELEANOR TECHNOLOGY COLLEGE)**

Schools' Members

Ellenor Beighton (Headteacher, Market Rasen, De Aston), John Beswick (Governor, Louth Cordeaux), Tim Bright (Headteacher, Bourne Westfield Primary), Bill Bush (Headteacher, Grantham, The Phoenix School), Martin Connor (Headteacher, North Hykeham North Kesteven School), Stephen Douglas (Headteacher, Cranwell Primary), Professor Ken Durrands CBE (Governor, Grantham, The Kings), Michael Follows MBE (Governor, Boston John Fielding Community Special), Anne Grief (Headteacher, Long Sutton Primary), Simon Hardy (Faith Groups), Linda Hayes (Governor, Ruskington Chestnut Street C of E Primary), Jeremy Newnham (Headteacher, Caistor Yarborough), Malcolm Shore (Headteacher, Grantham St Anne's C of E Primary), Heather Steed (Headteacher, Boston Nursery), Paul Strong (Headteacher, Welton William Farr C of E Comprehensive) and Jennifer Wheeldon (Headteacher, Scothern, Ellison Boulters C of E Primary).

Observer (with speaking rights)

Councillor Mrs P A Bradwell (Executive Councillor for Children's Services including Post 16 Education).

Officials

Children's Services Directorate:- Peter Duxbury (Director), Debbie Barnes (Assistant Director), Penny Richardson (Interim Strategic Manager - Inclusion), Sue Westcott (Assistant Director – Staying Safe), Tony Warnock (Head of Finance), Mark Popplewell (Assistant Financial Adviser), Paul Snook (Principal School Improvement Advisor Special Projects) and James Thomas (Principal Information Officer).

Chief Executive's Office – Steve Blagg (Democratic Services Officer).

Also in attendance

Councillor Martin Hill OBE (Leader of the Council) (part of the meeting only) and Adrian Reed (Headteacher, Boston Carlton Road, Primary School (representative from the Stakeholder Group).

Apologies for absence

St John Burkett (Headteacher, Deeping St James Linchfield County Primary), Roger Hale (Headteacher, Caistor Grammar), Paul Hopkins (Governor, Lincoln Monks Abbey Primary), Sarah Jelley (Governor, Nettleham Infants),

Margaret Johnson (Governor, Louth King Edward V1 Grammar), Jonathan Maddox (Headteacher, Bourne Grammar), Grahame Killey (Learning and Skills Council) and Barbara Peck (Staff Trade Unions).

49. STATEMENT BY THE CHAIRMAN – TERL BRYANT

The Chairman stated that for members of the Forum to be able to vote in accordance with normal practices they should be present for all of the debate.

The Chairman proceeded to read out the following statement:-

I would like the minutes to show that this extraordinary meeting of the Schools' Forum was called as the Forum is required to consider the impact on schools of any financial changes. The paper presented on 27 January 2010 outlined the principles of the proposed change to delegate funding for statements bands 1-5 and today's meeting will consider the impact of this proposal. By doing so, the Forum will ensure transparency and accountability and an opportunity to debate additional information. The Forum will be able to reflect on the opinions that the Forum requested and gathered from officers and the governors and head teacher community. This unusual step was taken entirely due to the sparsity of hard information and detail provided in the report to the Forum on this very important matter when it first came to us under two weeks ago.

In the paper compilation of comments from head teachers and governors it is very obvious that some people think that the Forum is in the position to make a decision, it is not, it is only in the position to tell the Council's Executive what the Forum members consider the scholastic community of Lincolnshire thinks of the proposals about the way ahead for SEN as proposed at 27 January Forum meeting.

The Forum have been assured that this is not a cost saving exercise or a reduction in money to schools, it is just trying to reallocate the monies from the DSG to schools ensuring the element of money that had been previously used and allocated by the statementing system was allocated fairly and transparently to meet the needs of the students.

The compilation is extremely articulate in saying that there has been little or no consultation with Governors, Headteachers or parents and asking that meaningful consultation takes place.

Unfortunately, due to sparsity of information assumptions have been made by respondees and some are clearly inaccurate.

I would at this point like to thank Eileen Russell for working over the weekend ensuring that the remaining half of compilation in front of you was completed, Mike Follows MBE and John Beswick for reading the innumerable e-mails I've forwarded to them and making cogent comments and above all Debbie Barnes who on three occasions was exchanging e-mails with me at 11:30 at night. My thanks also must go to all Forum members who took such an active part in canvassing opinion from their own sectors and finally all the people who put so much time and effort into reading and replying to my plea for information and opinion.

I must remind members that standard Council debating rules apply to the Forum meetings which basically say that no speech shall be over three minutes duration,

that members may only speak once during the debate but that I will allow, through the chair, points of information/clarification to be raised. I will relax this to ensure full and fair debate but I reserve the right to implement the final and most important rule that the chairman's decision on procedure is final. The agenda will be followed and anticipating a long meeting I propose that after the officers presentations and all the points of information raised by members of the Forum have been responded to that my Vice-Chairmen, John and Mike, raise any additional points that they feel have not been responded to that were raised in the compilation of responses. At some convenient point during debate I will call a 15 minute recess for tea and coffee to be served in the Members' annex.

I would call upon the Council's Executive to open the debate and I will give them the right of final reply before calling for the vote.

I would urge all members of the Forum to be cogent of the concerns of every school and their worries about individual "losses" but to remember that what we are being asked to consider is a major change in strategy because when you look at the compilation I think you will agree that no one appears to be happy with the existing system.

The Forum thanked the Chairman for the statement which members felt gave a fair and balanced view of the current situation.

(POST MEETING NOTE – ADDITIONAL NEEDS

The LA has confirmed that transitional arrangements are as follows:

For the first year, it is proposed that a floor of £0 is applied so that no school loses funding in 2010/11 under the new system, and a ceiling is set at £40,000, to limit the gains in individual schools (However, the ceiling may have to be lowered if insufficient resource is available). Transitional arrangements will also apply in 2011/13-the LA has given an undertaking to consult the Schools' Forum on these transition arrangements in 2010).

50. ADDITIONAL NEEDS: NEXT STEPS IN THE DIRECTION OF TRAVEL (Minute 43, Forum, 27 January 2010)

Peter Duxbury referred to the decision made by the Council's Executive on 2 February 2010 and stated that while the Executive had agreed to the principles for the delivery of additional needs services, delegation had been given to him, the Leader of the Council and the Executive Councillor for Children's Services including Post 16 Education, to develop a strategy and to decide whether to submit an application to the Secretary of State. This would involve consultation with the Forum, all relevant agencies and interested parties before any application was submitted to the Secretary of State.

Councillor Mrs P A Bradwell supported Peter Duxbury's statement.

The Chairman thanked both Peter Duxbury and Councillor Mrs P A Bradwell and expressed his appreciation that the Council was listening to the Forum and to the consultations received since the meeting of the Forum on 27 January 2010, emphasising that the Forum would hold the Council to account.

(1) Minute of the Council's Children and Young People Scrutiny Committee – 22 January 2010

The minutes of the meeting were noted.

(2) Report of the Council's Executive – 2 February 2010

Sue Westcott thanked those Headteachers and Governors who had submitted comments since the previous meeting of the Forum. She outlined the history of Direction of Travel; explained the consultations which had taken place with Headteachers and Governing bodies to date; explained the establishment and purpose of the Stakeholder Group including how that group had discussed the principles of the delegation model; stated that the comments received and tabled at the meeting, together with the responses to further consultations with schools and parents, this week, would be collated, together with comments from the Forum, and then submitted to the Leader of the Council, the Executive Councillor for Children's Services including Post 16 Education and Peter Duxbury, to make a decision.

Officers responded to comments made by the Forum about the sparsity of consultation and agreed that more comprehensive consultations could have been arranged, that the Council had learnt lessons from the consultation exercise, thanked the Forum for their assistance in instigating further consultation and that all parents of pupils with special educational needs had been informed in writing about the proposals for additional meetings last Friday.

The Forum acknowledged that the Council had accepted that its consultation arrangements could have been more comprehensive for such a major change of direction but the Council wished to move forward and emphasised a wish to carry out more detailed consultations and would ensure that the Forum was kept informed.

(3) Minute of the Council's Executive – 2 February 2010

These were noted.

(4) Feedback from Stakeholder Group

Adrian Reed, representing the Stakeholder Group, stated that the Group had met on four occasions and that their terms of reference, which the Forum had received, were clear. He stated that Headteachers had complained about the current system for a number of years and that whatever formula was decided upon would never receive 100% agreement. The formula proposed included deprivation, including free school meals (comprising 20% of the formula) and prior attainment (comprising 80% of the formula) was the preferred option and would avoid delays in preparing statements and reduce bureaucracy. He added that this was only the start of the process and the next stage included an examination of how the clusters or local areas would better support the service.

Bill Bush, a member of the Stakeholder Group, stated that the initial focus was on special schools and special services followed by consideration of issues about the 1-5 banding and delegation to schools would then become the main focus. There had been ample opportunity to discuss the effects of the changes on special schools and he accepted that special schools had a smaller number of pupils on roll but the children had more complex needs. He accepted the need for mainstream schools wanting to know the effects of the proposals and the need for consistency.

The Chairman stated that to his knowledge the Forum had never seen the terms of reference of the Stakeholder Group.

Officers stated that the outcomes from similar arrangements by other authorities had not been examined but that advice had been sought about the national strategy and concepts from other local authorities. Councillor Mrs P A Bradwell stated that Lincolnshire was in a minority of local authorities who had not delegated resources to schools in this way and added that those local authorities who had adopted the arrangements had fewer tribunals and statements and parents were more satisfied.

(5) Financial Modelling Implications

The Forum received a presentation from Tony Warnock on the financial modelling implications.

Responses to comments made included:-

1. Transport costs for children were funded from a separate budget by the Council and were not part of the DSG were being examined separately by the Council.
2. Spending on statements had increased and spend exceeded budget.
3. Research had been carried out into which schools the additional statementing money had been allocated.
4. There was to be a review in 2010 of special schools funding and SEN support services and this would include out of county provision.
5. The Council was seeking to minimise redundancies by use of redeployment.
6. All of the principles were supported by the Council and met the Government's key aims of predictability, inclusion and stability.
7. The new formula would ensure money was targeted to those schools with the highest need and would help narrow the attainment gap. Lincolnshire was not performing as well as it should be in the latter area.
8. Every Child Matters accorded with the new proposals with all children achieving their potential.
9. It was the responsibility of schools to identify children with special needs not the Council.
10. Explained the graphs to demonstrate the correlation between Prior Attainment and School Action Plus and the variation with existing funding.
11. It was appreciated that while there were other factors affecting special needs not connected to free school meals, the proposals attempted to match funding to those schools which met the proxy indicators (free school meals and deprivation indicated by post codes). The Council recognised the impact on schools' budgets and therefore there would be transitional funding. The proxy indicators were used by other local authorities.
12. There were inconsistencies with the present system which led to parental frustration.
13. The Council was trying to identify a rational system for delegating money to schools which met the Council's priorities.
14. Despite a large increase there was an overspend on statements and a high exclusion rate in the primary sector. Statements represented 4% of the schools' budget and pupil attainment was the Council's priority.

15. The relative merits of using Free School Meal eligibility and Postcode-based deprivation scores to identify schools serving areas of high deprivation were explained. Whilst Free School Meal eligibility identifies individual pupils from low income families and numbers of claimants have increased over the past few years, it is likely that this measure does not identify all pupils as some families do not take up the offer. Using the pupil's home postcode and its associated deprivation score provides an extra measure based on all pupils, but is not granular enough to identify the true circumstances of each individual. Therefore, it was proposed that using both measures as proxy indicators in the Model was the most balanced formula for schools.
16. Various options had been examined by the Stakeholder Group.
17. UNISON had been made aware of the proposals and while some schools might lose employees employment prospects in other schools would improve.
18. There had been dissatisfaction with the current statementing procedures for many years especially from Headteachers with the increasing number of tribunals they had to attend.
19. An explanation was given of the mid-point indicators and the problems in connection with Key Stage 2 and the use of data consistent across all schools together with an explanation of note pad. The mid-point assessment could be examined and put in the model at a later stage.
20. The Forum would receive reports reviewing the modelling system in the future on a regular basis.
21. An explanation was given in connection with addressing any issues raised by the Ombudsman.
22. Officers agreed to clarify an enquiry in connection with the support provided by Teaching Assistants to children with special needs.
23. Schools Action Plan and Schools Action were part of the current problem and it was acknowledged both involved a lot of bureaucracy and the local authority did not monitor this spend. The transitional arrangements recognised the issues which some schools would encounter and protection should be offered for three years.
24. The necessary representations would be made in connection with the re-allocation of 1:1 monies into special educational needs.
25. The financial modelling shown did not intentionally identify individual schools although unfortunately certain schools could be identified by their numbers on roll (NOR). This anonymity was done to ensure the Forum took an overall strategic view.

Officers thanked the Forum for facilitating the good response from Headteachers and Governing bodies, since the last meeting of the Forum. The views of parents with children with SEN would be sought in a series of public meetings in the next week.

Officers stated there was now insufficient time for the Council to examine further options because the economic situation would deteriorate rapidly from 2011. If the change was not commenced or planned for from 2010/11 the Council would be restricted in its ability to offer the level of protection proposed.

Officers stated that there would be a need for a close working relationship with the Forum in the future not only on this matter but other issues as the economic climate worsened and affected schools.

Councillor Martin Hill OBE, Leader of the Council, assured the Forum that the changes to the school funding scheme being proposed would be subject to review within the next twelve months.

RESOLVED

That the recommended way ahead as presented and detailed in the report to the Council's Executive on 2 February 2010, be supported on the understanding that the Council will consult widely, fully work towards providing a three year protection to those schools affected by the proposals and provide regular progress reports to the Forum and a full review before the next financial year.

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The meeting closed at 5:30 pm.