

**LINCOLNSHIRE SCHOOLS' FORUM**  
**24 JUNE 2021**

**PRESENT:**

Amy Stancer (Headteacher, St Giles Nursery School, Lincoln), Martin Kyle (Head Teacher, St Faith and St Martin's Junior School), Ian Randall (Head Teacher, Reepham Church of England Primary School), Catherine Stratton (Head Teacher, Saxilby Church of England Primary School), Michele Anderson (Head Teacher, Spalding High School), Professor Ken Durrands CBE (Governor, The King's School, Grantham), Gavin Booth (Head Teacher, Boston St Thomas' C E Primary School), Jo Slessor (Governor, Carres Grammar School, Sleaford), Steve Baragwanath (Executive Principal, University Academy Holbeach), Frances Green MA (Oxon) (Head Teacher, Somercotes Secondary Academy), Simon Pickett (Head Master, The King's School, Grantham), Katie Grivil (Head Teacher, Kirkby la Thorpe Church of England Primary Academy), Simon Morley (Head Teacher, Boston West Academy), Daniel Callaghan (Governor, Hartsholme Academy), Lea Mason (Executive Head Teacher, Lincolnshire Wolds Federation, Louth), Dr Stephen Hopkins (Trust Chair of Communities Inclusive Trust), Josh Greaves (Deputy Chief Executive Officer, Wellspring Academy Trust), Martin Shelton (College Principal, Linkage Community Trust), Helen Stokes (Branch Secretary, UNISON) and Julia Merivale (Manager, Trinity Day Nursery).

Officers in attendance:-

Elizabeth Bowes (Strategic Finance Manager, Schools Finance Team), Sheridan Dodsworth (Head of SEND), Nick Harrison (Democratic Services Officer), Mary Meredith (Service Manager - Inclusion and High Needs Strategy), Mark Popplewell (Head of Finance (Children's Services)), Martin Smith (Assistant Director for Children's Education), Tony Warnock (Operations and Financial Advice Manager), Rachel Wilson (Democratic Services Officer) and Nicky Myers (Interim Head of Service Early Years & Childcare Support).

1 ELECTION OF CHAIRMAN

RESOLVED

That Gavin Booth be elected (unopposed) as Chairman of the Lincolnshire Schools' Forum for 2021/22.

**GAVIN BOOTH IN THE CHAIR**

2 ELECTION OF VICE-CHAIRMAN

That Josh Greaves be elected (unopposed) as Vice-Chairman of the Lincolnshire Schools' Forum for 2021/22.

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### APOLOGIES FOR ABSENCE/REPLACEMENT MEMBERS

Apologies for absence were received from Rachel Barrett FCCA (Governor, North Kesteven Academy), Paul Thompson (Faith Group Representative) and Sarah Wilson (Executive Principal, Stamford Welland Academy).

An apology for absence was also received from Geraldine O'Neill (Sustainability Development Manager).

4

### DECLARATIONS OF MEMBERS' INTEREST

There were no declarations of members' interest made at this stage of the proceedings.

5

### MINUTES OF THE LINCOLNSHIRE SCHOOLS' FORUM MEETING HELD ON 22 APRIL 2021

RESOLVED

That the Minutes of the Lincolnshire Schools' Forum meeting held on 22 April 2021 be agreed and signed by the Chairman as a correct record.

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### CHAIRMAN'S ANNOUNCEMENTS

The Chairman, following recent elections, welcomed back Professor Ken Durrands OBE as a Secondary Academy governor; and Jo Slessor to her first LSF meeting as a Secondary Academy governor representative. He advised the Forum that it currently had four vacancies. An election would be held in due course to recruit to the vacancies.

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### LINCOLNSHIRE SCHOOLS' FORUM - CONSTITUTION AND MEMBERSHIP UPDATE

The Forum received a report from Mark Popplewell, Head of Finance – Children's Services, on the revised Lincolnshire Schools' Forum Constitution and Membership on which comments were invited.

As a result of changes introduced by Section 35 of the School and Early Years Finance (England) Regulations 2021 and the revised version of the Guidance issued March 2021, a review had taken place of the current Terms of Reference. The current Terms of Reference and the proposed revised version had been included in the report.

To ensure that the Schools' Forum operated in accordance with legislation and Guidance the Schools' Forum was asked to endorse the revised document as shown at Appendix B for recommendation to the Executive Councillor for Children's Services who was responsible for the final decision.

The revised Terms of Reference comprised of seven sections:

1. Constitution introduction indicating the statutory origins of the Forum and the regulations governing its operations. This included revisions to refer to the School and Early Years Finance (England) Regulations 2021 which by virtue of Regulation 35 permitted meetings of the Forum to continue to take place on a virtual basis; notwithstanding that emergency Covid-19 arrangements permitting this for all local authority meetings had otherwise now ceased to have effect.
2. Purpose and Role. A new section and Appendix briefly describing the overall purpose and role of the Forum.
3. The Functions of the Forum. A re-written section and the creation of an Appendix setting out the decision-making powers of the Forum and those matters it was entitled to be consulted on as reflected current legislation and the Guidance.
4. Composition. A revised section explaining membership requirements and reflecting the principle explained in the Guidance that non-school members may only constitute 1/3 of the Forum total membership. Also the requirement that Membership would be reviewed annually in June to ensure it was fully representative of different school sectors and in proportion to the number of children allocated to each sector. Subsequent paragraphs then explained the membership nomination and election basis for school members (both maintained schools and academy schools) and non-school members.
5. Conduct of Meetings. This section was largely unchanged, other than to indicate that meetings may be held by remote means.
6. Voting arrangements. Paragraphs (a) to (c) were re-written to reflect current requirements explained in the Guidance.
7. Administration of the Forum. Unchanged, save to indicate that meetings may be held at times to be agreed, rather than stipulating only 2pm.

The Chairman suggested that views from the Forum should be sought on preferences for how meetings were held going forwards. At present meetings were being held via Teams however, the Council Chamber at the County Council was now able to offer face to face meetings and also a hybrid of face to face and Teams. It was suggested that it may be worth considering whether a face to face meeting should be held for those meetings which considered reports which involved the more challenging decisions.

Dr Stephen Hopkins reported that the Department for Education had published two documents; one on the powers and responsibilities of School s' Forums and one on self-assessment checklists. He suggested that the document on powers and responsibilities seemed to be a more clear and concise compared to the report submitted. He suggested that it be circulated to the Forum and taken into account when further reports on the constitution were submitted in the future to the Forum. He suggested that the self-

assessment checklist could be considered in order to ensure alignment the current procedures at a future meeting.

**RESOLVED**

- 1) That the revised Lincolnshire's Schools' Forum Constitution and Membership document as detailed at Appendix B of the report be endorsed and be recommended to the Executive Councillor for Children's Services, Community Safety and Procurement for approval.
- 2) That the Department for Education documents on powers and responsibilities of Schools' Forums and on self-assessment checklists be circulated to the Forum, and the self-assessment checklists be considered at a future meeting.

**8      SECTION 251 BUDGET STATEMENT 2021/22**

The Forum received a report from Elizabeth Bowes, Strategic Finance Manager, Schools Finance Team, on the Section 251 (s.251) budget statement for the 2021/22 financial year.

Local Authorities (LAs) were required under s.251 of the Apprenticeship, Skills, Children and Learning Act 2009 to prepare and submit an education and children's social care budget statement for the relevant period to the Secretary of State for Education by 30 April each year. The s.251 return was intended to provide a clear picture of the LAs planned spending on its schools budget, de-delegated items, high needs budget, early years budget, central provision within the schools budget and children's and young people's services. The LAs s.251 budget statement and the Department for Education's (DfE's) benchmarking data that was published later in the year should assist the Schools Forum's consideration of budget levels across the activity headings.

The report included a copy of Local Authority Table 2021/22 which provided an overall picture of the funding being allocated direct to schools and high needs delegations; the amount being spent on education centrally and children's social care. The total Dedicated Schools Grant (DSG) for 2021/22 was £646.900m. The Forum was advised that within the Schools block, 99.8% of funding was devolved to schools, the remaining 1.2% related to the Growth budget. The Early Years block was allocated to the sector based on participation levels, it was anticipated the 96.34% of the block would be allocated to the Early Years sector by the end of the financial year. It was noted that within the High Needs block 74.19% was earmarked to be devolved to Lincolnshire schools, colleges and Early Years for pupils who required additional support. Looking at the DSG in its entirety 97.1% was directly allocated to schools and academies with the remaining 2.9% being used to support statutory services.

(Catherine Stratton (Head Teacher, Saxilby Church of England Primary School) and Simon Pickett (Head Master, The King's School, Grantham) joined the meeting at this point)

Following a question from Martin Kyle on the publication of the Lincolnshire Schools' budget and current figure for targeted funding, Mark Popplewell confirmed that budgets had been published in February using the latest datasets and that those budgets impacted by demand, assumptions had been made to budget for the increased costs. For targeted funding £1.097m had been built into the budget to accommodate increased spending from growth in the number of Education, Health and Care plans, which would result in new schools receiving targeted funding and existing schools receiving increased allocations. This was the difference between schools published information and the final budget figures included in the report.

Following a question from Amy Stancer, Elizabeth Bowes undertook to provide a further breakdown of paragraph 1.2.5, regarding support services in early years.

RESOLVED

That the report be noted.

## 9 ANNUAL REPORT ON SPECIAL EDUCATIONAL NEEDS AND DISABILITIES

The Forum received a comprehensive annual update report from Sheridan Dodsworth, Children's Services Manager, Special Educational Needs and Disabilities, on Special Educational Needs and Disabilities (SEND) as required by the Schools' Forum Regulations. The report covered: An update on SEND activity both nationally and within the county; An overview of the high needs costs illustrating increasing pressures on the High Needs Budget; An update on the transformation work that was taking place in Lincolnshire; An overview of the capital programme for Special Schools; and A brief update on activity to support families during the Covid-19 pandemic.

The report noted that the high needs budget was undoubtedly under significant pressure but there was a continued commitment to ensure that the financial resources available were being effectively deployed to realise improved outcomes for children and young people with additional needs. Whilst Lincolnshire remained above the national average in terms of the numbers of children identified with special educational needs and disabilities, there were early signs of a change in practice that moved away from a reliance on statutory plans but built on the inclusive practice that many Lincolnshire schools adopt. The Forum noted that there was further work to be done to embed a strengths-based approach to working with pupils with SEND, and their families, but the early indications suggested that the transformation programme could make the difference to ensure that Lincolnshire met the needs of pupils and balanced the budget also.

During discussion, the Forum raised the following points:

- It was noted that the differentiation in SEN data between Local Maintained Schools and Academy Trusts would be helpful in future reports. It was confirmed that the process and funding were the same for these bodies.

- There was concern about whether the existing high needs budget was sufficient and whether there was a need for a review to determine whether it could be increased. It was thought that more than the 0.5% transfer permitted from the Schools block to the High Needs block would be required. In response it was reported that high needs funding was a challenge nationwide. The Forum was advised government SEND reviews were awaited which would address the SEN framework and overall SEN funding. Locally the County Council was doing everything it could to keep within current funding, but with its many variables and uncertainty of future funding levels, the financial position would continue to be kept under review, and options and recommendations would come from that.

(Tony Warnock gave his apologies and left the meeting at this point)

- It was noted that there were deficits in many local authorities and that the County Council was in a better position than most. It was reported that collaboration between the Council and schools was vital to achieve a sustainable budget. Any extra funding over the 0.5% would require approval of the Secretary of State.

Martin Kyle read out a letter from a group of Lincoln City Maintained and Academy School Headteachers who represented 14 schools and in the care of 4,896 Lincoln City pupils. The letter had been addressed to Martin Smith Assistant Director Lincolnshire County Council, Suzanne Scott Chair of LLPB and the Chair of Lincolnshire School Forum. The letter highlighted how several Lincoln City schools seemed to have been adversely affected by a large reduction in their school budgets to support children with additional needs through the local Targeted Funding criteria.

The letter requested that:

*'1) No school in the City of Lincoln should lose more than the average school in Lincolnshire which was -£6,386 when a year-on-year comparison was made (of course adjusting for any change in the number of EHCs accordingly).*

*2) Future consideration be given to an assumption that deprived areas, by default, serve higher numbers of EHC pupils when this is in no way reflected in the application process or success rate of EHC applications.*

*3) Future surveys or votes on new funding systems clearly show the result and impact to all schools in Lincolnshire at the point of voting. We feel this would further support members in their considerations of the impact decisions can make on a locality.*

*4) The impact of these decisions are discussed in the next appropriate Lincolnshire Schools Forum and Lincolnshire Learning Partnership Board meeting with a view to consider all possible solutions to address this funding shortfall.'*

(During the reading out of the letter it was reported that the 'live streaming' of the meeting had ceased and therefore the Chairman adjourned the meeting for one minute until streaming could be resumed)

(Martin Shelton (College Principal, Linkage Community Trust) joined the meeting at this point).

In response to the content of the letter discussion took place on the following points:

- It would have been helpful for the Forum to have had sight of the letter prior to the meeting due to its length and number of points made. It would be difficult to therefore to consider an in depth view or have an informed debate at the meeting.
- It was noted by the Chairman that other areas of Lincolnshire were also affected not just Lincoln City and that the issue should be looked at from a wider perspective. There needed to be a fair and equitable system across the County.
- As part of the LA schools funding consultation on the National Funding Formula indicative figures had been included which demonstrated the financial impact at an individual school level on the proposed changes that included Targeted Funding. The principle of using notional SEN when assessing whether schools would be entitled to Targeted Funding was supported by the sector and aligned to the National Funding Formula.
- Not all Local Authorities provided Targeted Funding support to schools with high number of pupils with SEN. The Committee was advised that Lincolnshire was fully supportive of the inclusive approach, and was proud to have a Targeted Funding arrangement.
- The national funding for formula had brought in significant increases in funding for Lincolnshire schools which was important to recognise when reflecting on Targeted Funding. This was because of the direct link between schools delegated budgets in determining 'notional SEN' and Lincolnshire's local Targeted Funding approach. It was highlighted that the original Targeted thresholds had been in place since 2015/16 (pre-National Funding Formula) and the criteria and threshold levels had remained unchanged, and therefore required updating to reflect schools pupil-led funding delivering fairness in the distribution of funding, and the effective deployment of the Dedicated Schools Grant. It was no longer sustainable in its current form.
- It was noted that the LA funding formulas involving the mainstream schools treated them all the same through objective, transparent and equitable criteria's.
- The Forum was advised that schools with higher levels of pupil deprivation would receive a higher level of pupil-led funding through the National Funding Formula to support those pupils, which would involve supporting notional SEN.
- A response from schools finance should be shared with the Forum.
- The County Council had avoided overspending and transferring money from other blocks of funding. It was highlighted that if the Council had not implemented the new policy and the trajectory of spend had continued even more challenging decisions would have been required in terms of transferring funding from the Schools block and re-considering support services to schools, which were highly valued by the sector.

- A sector working group would be set up by the Council in the autumn to discuss the 2022/23 National Funding Formula updates and those SEN issues in preparation of future years funding intentions.

The following points on the report were also raised:

- There was a need for assistance in helping Forum members, teachers, governors and parents to better understand current funding and finance and consequences and pressures and challenges arising from the current position. Particular the reference was made to parental perceptions; EHC plans demands, the approach to SEN, high needs budgets. It was thought that information could be included in the Head Teacher Briefings as a starting point.

#### RESOLVED

- 1) That the report and comments made above be noted.
- 2) That the letter and response as mentioned above be circulated to the Forum for further consideration.

#### 10 ANNUAL EARLY YEARS REPORT

The Forum received a report from Nicky Myers, Interim Head of Service Early Years and Childcare Support, in place of the Sustainability and Development Manager, on an update on the delivery of services to support early years and childcare provision across Lincolnshire and outlined the priorities for the Early Years and Childcare Support Services for 2021/22. The Forum was asked to consider and note the content of the report and agree the priorities for the Early Years and Childcare Support Service for 2021-22.

The report mentioned that as the government restrictions changed work was being undertaken towards the wider priorities of the Corporate Plan, the following key priorities had been identified for the Early Years and Childcare Support Service in 2021-22:

1. Provide sufficient, high quality and inclusive education places locally.
2. Ensure eligible children aged 2, 3, and 4 years old were able to access their Early Years Entitlement place in high quality inclusive provision.
3. Deliver quality children centres, which were at the heart of our communities supporting families so their children thrive, through working with key partners and communities
4. Ensure fit for purpose, appropriate services were available for families to narrow the achievement gap, so all children thrive and achieve their potential.

5. Promote and support providers to understand the new Ofsted inspection framework across the early years and childcare sector.
6. Engage providers, schools, academies and partners in a sector led improvement approach to embed effective transition arrangements to better prepare children for school.
7. Design and deliver a good quality early years training and development programme focussing on the statutory requirements and the implementation of the new Early Years Foundation Stage.

During discussion, the following points were raised:

- Children's centres had remained open during the Covid-19 pandemic. Places were on a bookable basis and numbers due to social distancing had been reduced. Non mobile babies had been prioritised. Demand was now increasing and as many sessions were being put on as possible.
- The Interim Head of Service undertook to report back on the background to the decision made on the provision of new framework training. The Government had suggested that this would be delivered by other partners. The Forum was advised that training was subsidised for the sector and approved annually by the Schools' Forum at the January meeting.

RESOLVED

- 1) That the report be noted.
- 2) That the key priorities for the Early Years and Childcare Support Service in 2021-22 as outlined in the report and above be approved.

## 11 LINCOLNSHIRE'S ALTERNATIVE PROVISION ARRANGEMENTS

The Forum received an overview report from Mary Meredith, Head of Inclusion, on Lincolnshire's current and future alternative provision arrangements. The report included a table showing a Permanent Exclusion Comparison from 2016 to 2020/21 by School Type.

(Julia Merivale gave her apologies and left the meeting at this point).

The Schools Forum had supported the LAs decision to commission the Behaviour Outreach Support Service (BOSS) and Alternative Provision (AP) places which had been made available to schools for pupils at risk of permanent exclusion, should the BOSS intervention prove insufficient. With a Pastoral Support Plan (PSP) the earliest intervention (and protecting the capacity of BOSS) this was in essence Lincolnshire's 'Behaviour Ladder'. The steps of the Ladder had been embedded county-wide over the past five years. A key risk was managing the capacity of commissioned places so that the LA could deliver its statutory duty whilst opening up a second (non-statutory) route, via intervention placement, into AP. If the rate of

permanent exclusion did not reduce, this would not have been possible (without costly expansion). The ongoing challenge was to ensure that the rate of permanent exclusion did not increase to the extent that the behaviour Ladder could no longer function because AP places were entirely occupied by permanently excluded pupils.

It was noted that whilst the lockdown had clearly had a significant impact on the number of pupils permanently excluded, the 2019/20 rate of permanent exclusions from secondary schools was significantly lower than in previous years. Most permanent exclusions were for persistent disruptive behaviour. The majority of AP learners had been referred via the Ladder rather than permanently excluded. However, what the reduced rate of permanent exclusion from all sectors did strongly suggest was that inclusive practice in Lincolnshire was strengthening and that the AP arrangements were a key driver of that. With regards to this, Lincolnshire was confounding a national trend of increased exclusions and this reflected very positively indeed upon the sector.

- Liaison with multiple local authorities on cases was very difficult and challenging.
- There was a migration of troubled youngsters as some schools divested themselves of these challenges.
- There was pressure to accept troubled youngsters and looked after children from other schools
- The referral team were thanked for their support and hard work
- School staff were becoming more accustomed to dealing with troubled youngsters and in considering alternative interventions. It was suggested that consideration could be given to promoting best practice and whether BOSS could be by passed. It was suggested that Boss was evolving and was able to take into account best practice changes so there was the potential to lose out on this function if it were to be by passed.

#### RESOLVED

That the report be noted.

(Elizabeth Bowes left the meeting).

#### 12 ACADEMIES AND TRUST UPDATE

The Forum received a report from Mark Popplewell, Head of Finance - Children's Services, on the latest number of academies and pupils in academies, and academy trusts.

Since the last report, Friskney All Saints Church of England (Aided) Primary School had joined Lincoln Anglican Academies Trust as a converter academy on 1 May. This meant that 28,813 (51.7%) FTE primary pupils were now educated in academy schools. Horncastle Community Primary School was proposing to join Wellspring Academy Trust and Gedney Church End Primary School and Lutton St Nicholas Primary School were proposing to join Keystone Academy Trust. All these conversions were scheduled to happen on 1 September 2021.

Therefore, on known information, the total number of all academies would rise to 189 (51.8%), and 76,759 (72.3%) FTE pupils would attend those academies. The number of primary academies would rise to 117 (41.6%) educating 29,430 (52.8%) FTE pupils.

RESOLVED

That the report be noted.

13 LINCOLNSHIRE SCHOOLS' FORUM - WORK PROGRAMME

Consideration was given to the future work programme of the Forum.

RESOLVED

- 1) That the work programme as presented be noted.
- 2) That The Department for Education publication on the self-assessment checklist as discussed in agenda item 7 (Constitution and Membership) be added to the next agenda.

The meeting closed at 3.02 pm