



LINCOLNSHIRE SCHOOLS' FORUM 14 JANUARY 2021

PRESENT: GAVIN BOOTH (CHAIRMAN)

Joanne Noble (Headteacher, Gainsborough Nursery School), Anthony Stevens (Governor, The Holt Primary School, Skellingthorpe), 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), Rachel Barrett FCCA (Governor, North Kesteven Academy), Professor Ken Durrands CBE (Governor, The King's School, Grantham), Steve Baragwanath (Executive Principal, University Academy Holbeach), Frances Green MA (Oxon) (Head Teacher, Somercotes Secondary Academy), Simon Pickett (Head Teacher, The King's School, Grantham), Sarah Wilson (Executive Principal, Stamford Welland 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) (Vice-Chairman), Paul Thompson (Faith Groups), Helen Stokes (Branch Secretary, UNISON) and Julia Merivale (Manager, Trinity Day Nursery).

Officers in attendance:-

Elizabeth Bowes (Strategic Finance Manager, Schools Finance Team), Katrina Cope (Senior Democratic Services Officer), Geraldine O'Neill (Lead Consultant - Early Years Entitlement), Mark Popplewell (Head of Finance (Children's Services)), Martin Smith (Assistant Director for Children's Education), Tony Warnock (Operations and Financial Advice Manager) and Sue Williams (Head of Educational Strategy).

15 APOLOGIES FOR ABSENCE/REPLACEMENT MEMBERS

Apologies for absence were received from Penny Davies (Governor, Saxilby C E Primary School), Katie Grivil (Head Teacher, Kirkby la Thorpe Church of England Primary Academy), Simon Morley (Head Teacher, Boston West Academy) and Mark Woods (Chief Executive Officer, Stamford and Welland Academy).

The Committee noted that Sarah Wilson (Executive Principal, Cambridge Meridian Academies Trust) was substituting for Mark Woods until further notice.

16 DECLARATIONS OF MEMBERS' INTEREST

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

17 MINUTES OF THE LINCOLNSHIRE SCHOOLS' FORUM MEETING HELD ON 8 OCTOBER 2020

RESOLVED

That the minutes of the Lincolnshire Schools' Forum meeting held on 8 October 2020 be agreed and signed by the Chairman as a correct record.

18 CHAIRMAN'S ANNOUNCEMENTS

The Chairman on behalf of the Forum welcomed the following newly elected members:

- Steven Baragwanath (Secondary Academy Head Teacher)
- Mrs Frances Green (Secondary Academy Head Teacher)
- Simon Pickett (Secondary Academy Head Teacher)
- Daniel Callaghan (Primary Academy Governor)
- Lea Mason (Special Academy Head Teacher)
- Dr Stephen Hopkins (Special Academies Governor)

The Forum was advised that there were still four vacancies on the Forum and that an election would be held in due course.

The Chairman also welcomed Sarah Wilson to her first meeting.

19 NATIONAL FUNDING FORMULA FOR SCHOOLS (2021/22)

The Chairman invited Mark Popplewell, Head of Finance – Children's Services to present the report, which provided the Forum with an opportunity to comment on the Local Authority's funding formula for 2021/22 following the government's funding announcements on the mainstream schools national funding formula proposals. Appendix A to the report provided the Forum with details of the outcomes of the Local Authority's consultation with mainstream schools.

The Forum was advised of the background to the national funding formula (NFF) and to the fact that the purpose of the introduction of the NFF was to create consistency in funding across all schools nationally and to ensure fairer settlement for each school.

Table one outlined Lincolnshire's schools overall funding level for 2021/22 through the implementation of the NFF compared to other Local Authorities. The Forum noted that Lincolnshire's position nationally had improved since the NFF was implemented.

It was reported that illustrative 2021/22 funding for Lincolnshire's primary and secondary mainstream schools (using the October 2019 data) was an overall increase of £18.067m in delegated funding, when taking into account the £20.769m added into the schools block for teachers' pay and pension grant funding.

Page 18 and 19 of the report provided details of the proposed Lincolnshire's Schools Funding for 2021/22, namely to continue replicating the government's NFF in 2021/22, subject to affordability. It was noted that the matter of affordability had arisen due to the time lag in data used to fund Local Authorities Schools block allocations and the significant rise in Free School meal eligibility as a result of the pandemic. It was noted further that the Local Authority would consider all options available to ensure individual school level implications were minimised before a final decision was made.

The Forum was advised that the Local Authority had also consulted on the proposal to continue using targeted funding as an approach to supporting schools, to use the actual amount of notional SEN determined through the NFF when identifying whether a school had sufficient notional SEN to support pupils with an educational health and care plan. The change in the methodology would provide fairer funding, and transition protection would be provided to support this change.

The Forum noted overall, 60 schools had responded to the consultation, which had been an improvement on previous consultation exercises. It was highlighted that of the schools that had responded the support rate had ranged from 93% to 100% across the consultation questions for the Local Authority's proposals to continue replicating the government's NFF in 2021/22 and to use the NFF as the basis for determining the notional SEN amount per school, when identifying whether a school was entitled to targeted funding. The outcomes of the consultation were shown on pages 32 to 39 of the report pack.

Details of next steps and direction of travel were shown on page 22 of the report.

In conclusion, the Forum was advised that the Local Authority's proposals were to continue adopting the NFF in 2021/22 (subject to affordability), and the SEN related amendments, details of which were shown on page 23 of the report.

The Forum was advised further that of the schools that had responded to the consultation, the vast majority had supported the Local Authority's proposal to continue placating the government's national funding formula in 2021/22, and the SEN related amendments.

During discussion, the following points were raised:

- What plans were in place for schools that were losing out on funding. Confirmation was given that losing schools through the NFF as a result of their historic funding levels would not see a reduction in NFF per pupil funding, due to the government's positive minimum funding guarantee of +0.5% to +2.00%; and
- Clarification of Lincolnshire's unit of funding figures in Table 1 on page 18, compared to the minimum per pupil funding levels detailed on page 19 of the report. The Forum was advised that table one provided the overall funding the Local Authority received plus school site factors to fund delegated budgets, and that the per pupil

funding level figure was a formula criteria to ensure all primary and secondary schools would attract the minimum per pupil funding level, by sector.

RESOLVED

1. That The National Funding Formula for Schools Update report for 2021/22 be noted.
2. That support be given to the Local Authority's funding proposals for 2021/22, including continuing to replicate the national funding formula, subject to affordability.

20 SCHOOL FUNDING ARRANGEMENTS 2021/22

The Chairman invited Elizabeth Bowes, Strategic Finance Manager, Schools Finance Team to present the report, which briefed the Schools' Forum on the school funding arrangements for 2021/22. This report had been circulated separately to the Forum.

The Forum was advised of the background to the NFF, and details of the school funding announcements.

The Forum noted that the Dedicated Schools Grant (DSG) would continue to comprise of four blocks: Schools block, Central School Services block, High Needs block and Early Years block and that each of the four blocks continued to be determined by a separate national funding formula.

Table 1, on page 2 of the report provided details of Lincolnshire's 2021/22 DSG allocations. The Forum was advised that Lincolnshire's overall funding levels across the four blocks had increased. The Forum noted that the greatest challenge for Local Authorities, and Lincolnshire was the increasing demand of more young people requiring specialist support, which was having a material financial impact on the High Needs block and its sustainability. Further details relating to each of the four blocks were shown on pages 3 to 11 of the report, including measures to support change.

The Forum was advised that in accordance with the Department for Education regulations, the Local Authority was required to seek Schools' Forum agreement in relation to the setting of central budgets within the DSG, and tables 2 to 4 of the report highlighted the budgets requiring Schools Forum agreement. These were:

- Table 2: Budgets requiring Schools Forum decision – Schools Block. A proposed budget of £2.696m for 2021/22 for significant pre-16 growth;
- Table 3: Budgets requiring Schools Forum decisions – Central School Services Block on going commitments, which comprised of the following proposed budgets figures for 2021/22: Admissions - £0.633m; Local Authority Retained Duties for all schools - £1.530m; and the servicing of the Schools Forum £0.020m; and

- Table 4: Budgets requiring Schools Forum decisions – Central School Services Block historic commitments, which comprised of the following proposed budget figures for 2021/22: Schools Broadband £1.199m; and Private Finance Initiative Schemes £0.573m.

Reassurance was given that the budgets proposed were prudent and had been determined following a detailed review. The Forum noted that some minor refinements to the overall budgets might be necessary and that in accordance with established practice; these would be reported to the Schools Forum in June 2021.

It was reported that the Executive was currently consulting on a single year financial plan for revenue and capital budgets. It was highlighted that the Council continued to face future financial uncertainties, added with the growing cost pressures from demand-led services such as adults and children's social care and inflationary pressures on contracted services. It was highlighted further that the Medium Term Financial Plan showed that a balance budget could be achieved for 2021/22, with a budget surplus of £1.921m, but for 2022/23 and 2023/24 there would be a budget shortfall. The Forum noted that the situation for the Council continued to have a significant bearing on Children's Services budget of £122.184m.

The Forum noted the Coronavirus pandemic had impacted significantly on the 2020/21 financial year, and that central government had provided grant funding to cover costs and losses arising directly from the pandemic.

Details of next steps to be taken were shown on page 12 of the report.

In conclusion, the Forum noted that the Local Authority proposed to continue adopting the NFF in 2021/22 (subject to affordability); and that any changes to overall budgets would be reported to the Forum at its June 2021 meeting.

During discussion, the following points were raised:

- That further information should be included in the report with regard to financial risks. Reassurance was given that the schools NFF had been in place for a number of years, and the risk and impact was detailed in the proceeding paper. There was however risk within the reduction of the historic element of funding with the Central School Services block. It was also highlighted that the overall budget process was a rigorous and robust exercise. Officers however, agreed to draw out the financial risk and impact in the separate section of reports going forward;
- The impact of the decision to use the October census data for the calculation of Pupil Premium. The Forum was advised that the Education & Skills Funding Agency (ESFA) had not advised of the rationale for this change. It was noted that this would be followed up; and
- Cost of out of county placements. The Forum was advised that currently there were 201 placements outside Lincolnshire. The challenge for the Council was managing need. The Forum was advised that the Building Communities of Special

Provision Strategy would be expanding existing special school provision across the county to help meet demand.

RESOLVED

That the Local Authority's proposals relating to a number of centrally held budgets as detailed in tables 2 to 4 of the report presented be agreed.

21 EARLY YEARS NATIONAL FUNDING FORMULA

The Chairman invited Geraldine O'Neill, Sustainability and Development Manager to present the report, which provided a summary of the Early Years National Funding Formula for 2021/22; detailed the funding distribution for early years providers in Lincolnshire; and sought agreement from the Schools Forum to the Local Authority's proposals relating to the allocation and distribution of the centrally retained budgets.

The Forum was advised that the spending review provided nationally £44m for early years education in 2021/22 to increase the hourly rate paid to childcare providers for the governments' free hours offers.

It was noted that Lincolnshire's government funded hourly rate before protections were applied was £4.24. The rate had been uplifted by £0.06. The government then topped up all rates to an increased minimum funding floor of £4.44 for Local Authorities.

Details of the six relevant funding streams which formed the Early Years block of the DSG were shown on the top of page 44.

It was reported that the early years indicative funding for Lincolnshire for 2021/22 was £35.529m, based on the January 2020 census information.

Note: Lea Mason left the meeting (2.06pm).

The Forum was advised of the Lincolnshire's Early Years funding formula for determining the local universal rate. Details of the approach taken by the Local Authority were shown on pages 46 and 47 of the report. It was reported that for 2021/22 the local universal base hourly rate per pupil was £4.04, an increase of £0.06 from 2020/21.

It was noted that for 2021/22 the Local Authority would be continuing to use the same deprivation factor and deprivation monetary values which had been in place for 2020/21. Details of the deprivation scores and associated funding were shown in table 1 on page 48 of the report.

The Forum was advised that the SEN Inclusion Fund had been reviewed in line with national guidance and that the planned funding allocation using the current protocol was remaining the same for the financial year 2021/22 at £0.650m per annum, which represented £0.081 per pupil per hour.

It was reported that Local Authorities were able to hold back funding to act as a contingency to fund providers throughout the year. It was noted that the annual budget of £0.129m was required to cover additional hours.

The Forum was advised that the government required Schools Forums to agree 2021/22 central spend for early years by 28 February 2021. Details of the budgets requiring Schools' Forum agreement were:

- Early Years Entitlement & Securing Sufficient, Sustainable Provision £519,191;
- Early Years Foundation Stage (EYFS) Quality Improvement, Advice, Support, Workforce & Training for the Sector £911,069; and
- Special Education Needs & Disabilities (SEND) Local Offer £77,400.

Details of Lincolnshire's Early Years Funding Distribution were shown in table 3, on page 55 of the report for the Forum's information. It was highlighted that the pass-through funding was 95.76%, which was greater than the 95% government requirement threshold.

It was reported that the two year old hourly rate for 2021/22 was £5.03 per pupil, which was an £0.08 increase from the 2020/21 per pupil funding level. The Forum noted that the increase was made up of the government funding addition.

A short discussion ensued, from which the following points were raised:

- Thanks were extended to the Early Years Team for all their support during lockdown;
- Concerns were expressed regarding the longevity of providers, as a result of reducing numbers;
- Benchmarking information with regarding to central spend. The Forum was advised that benchmarking information was available on line from the government, and this would be made available to members of the Forum. Reassurance was given that as much funding as possible was passed on to providers, the Local Authority would only retain what was necessary for supporting providers;
- Risk analysis information. The Forum was advised that this information would be included going forward;
- Maintained Nursery schools had not seen an increase in their rate since 2016/17; and
- Whether calculation of the deprivation supplement would be affected, as previously the October census data would have been used. Officers confirmed there had been a slight reduction in attendance to what there had been in the previous year, but it was felt there was no need to change the methodology.

RESOLVED

1. That the Early Years National Funding Formula report presented be noted.

2. That the Local Authority's proposals for centrally retained funding as detailed in the report on pages 50 to 52 be agreed.

22 LINCOLNSHIRE LEARNING PARTNERSHIP UPDATE - SECTOR LED SYSTEM OF SCHOOL IMPROVEMENT

The Chairman invited Sue Williams, Head of Educational Strategy to present the report, which provided the Schools Forum with an update on the work of the Lincolnshire Learning Partnership Board (LLPB) and sector-led approach to school improvement.

In guiding the Forum through the report, reference was made to the background behind the Lincolnshire Learning Partnership Board and its role.

Details of the programmes and projects funded or endorsed by the LLPB in partnership and supported by the Council's Education Team were shown on pages 58 and 59 of the report. These included Mobilise, Peer Review/Peer Improvement Pathway, Annual Conference, Leadership Briefings, Governor Partnership Meetings, Stronger Governance, LeadLincs, Confident Choices, Early Years, Small Schools, LEAP/LAMP/LENS; Education Locality Leads; DfE Hub Initiative and One Plan.

Note: Ian Randall left the meeting (2.34pm).

The Forum was advised that during the pandemic the Local Authority and LLPB had been at the centre of guiding and steering the sector-led system. To manage the needs of schools and the pandemic, new approaches had been established to ensure that the impact on learning was minimised. This had included running LLPB meetings online and more frequent; briefings had been presented as a single offer from the council and the LLPB; specialist briefings had been arranged for different groups; and the local education leads had set up locality based support networks for heads to share ideas and support each other through the crisis.

In conclusion, the Forum was advised that the LLPB was essential to the education system in Lincolnshire for the role it performed, whilst working in partnership and collaboration with the council and other partners.

The Forum was advised that in addition to the board's £0.280m existing funding commitments, a decision not to commit funding remaining in the DSG reserves of £0.670m had been made, to allow the LLPB to act as required, to address identified schools needs at a system-wide scale. It was highlighted that the Board were aware of the pressure schools leaders were facing due to the pandemic and adaptations had already been made to the partnership contract to support Lincolnshire schools recover from the pandemic with 'Recover Lincolnshire', which covered aspects such as resilience for school leaders and support to get pupils back on track with learning.

During discussion, some members of the Forum expressed their thanks to the Local Authority for their invaluable support and for their engagement with all sectors.

Clarification was sought as to the future role of the Strategic Education Group (SEG). The Forum was advised that the role SEG was a short term arrangement to assist and support the LLPB until September 2021.

Confirmation was also given that the next meeting of the LLPB was scheduled for 5 February 2021.

RESOLVED

That the Lincolnshire Learning Partnership Update - Sector Led System of School Improvement report presented be noted.

23 SCHEME FOR FINANCING SCHOOLS

The Forum gave consideration to a report from Mark Popplewell, Head of Finance - Children's Services, which provided an update in relation to the latest publication by the Department for Education (DfE) of its revised guidance on the Scheme for Financing Schools.

The Forum was provided with background information relating to the Scheme. It was highlighted that any amendment to the Scheme must be consulted on with all maintained schools and approved by the Schools Forum. Confirmation was given that the Scheme was not relevant to academies.

It was reported that the DfE reviewed the scheme on an annual basis, and had directed Local Authorities to make amendments to their Schemes in accordance with DfE revisions. The Forum was advised that the DfE amendments did not come into effect until 1 April 2021.

The Forum was advised further that from Lincolnshire's perspective, there had not been any significant amendments. Details of the relevant revisions were shown on page 68 of the report presented.

In conclusion, it was reported that the Local Authority would continue to review announcements from the ESFA regarding further amendments to the scheme; and then publish revisions to the scheme by April 2021.

RESOLVED

That the Scheme for Financing Schools report be noted.

24 ACADEMIES AND TRUST UPDATE

The Chairman invited Elizabeth Bowes, Strategic Finance Manager, Schools Finance Team to present the report, which provided the Forum with information on the latest number of academies, pupils in academies and academy trusts.

10
LINCOLNSHIRE SCHOOLS' FORUM
14 JANUARY 2021

It was highlighted that since the effective date of the last report (1 October 2020), no further schools had converted to academy status.

It was reported that a further five primary schools were intending to be academies by 1 June 2021.

Information relating to the projected six month status of all Lincolnshire State Schools was provided on pages 72 to 73 of the report presented.

The report also provided a list of academy trusts nationally that operated within Lincolnshire.

RESOLVED

That the Academies and Trust update be noted.

25 LINCOLNSHIRE SCHOOLS' FORUM - WORK PROGRAMME

Consideration was given to the work programme detailed on pages 75 – 78 of the report.

RESOLVED

That the work programme as presented on pages 78 -78 of the report pack be noted.

The meeting closed at 2.56 pm.