

# Lancashire Schools Forum meeting of 6 July 2021 via Microsoft Teams

## Executive Summary

Shaun Jukes has sent apologies for this meeting, so the Chair will be taken by Stephen Booth as Forum Vice-Chair.

### **1. Attendance and Apologies for Absence and 2. Substitute Members**

To note attendance and apologies for absence and welcome any substitute members.

### **3. Forum Membership**

To note the Forum membership changes since the last meeting.

### **4. Minutes of the Last Meeting and 5. Matters Arising**

To agree the minutes of the last meeting held on 18 March 2021 and any matters arising.

### **6. Dedicated Schools Grant (DSG) Historic Commitments - Early Intervention and MASH**

Dave Carr, Head of Service Policy, Information and Commissioning (Start Well) and Chris Coyle, Head of Service MASH & Complex Safeguarding will attend the meeting to present the reports on the respective services.

To consider the reports about the Early Intervention and MASH service provision that have been funded through DSG historic provision allocations.

### **7. Recommendations from the Schools Block Working Group**

To consider the recommendations from the Schools Block Working Group held on 22 June 2021.

#### *i. Schools Budget Outturn 2020/21*

This report provided information on the Schools Budget Outturn for 2020/21 and the group gave particular consideration to the Schools Block and Central School Services Block (CSSB) expenditure.

*The Working Group:*

- a) Noted the report and the 2020/21 Schools Budget final financial outturn position.*

#### *ii. School Balances and Clawback 2020/21*

This report provided information on School Balances and Clawback for 2020/21 and included details of individual school balances at 31 March 2021. Views on future clawback arrangements were sought as part of the report.

*The Working Group:*

- a) Noted the report.*
- b) Noted the overall school balances position at 31 March 2021, including the individual school level information provided in the report.*
- c) Noted the previous Forum decision to suspend the application of clawback at 31 March 2021.*
- d) Noted the increase in committed balances at 31 March 2021.*
- e) Recommended that clawback be again suspended in 2021/22, but that notice be given to schools that it will be reintroduced at the end of 2022/23 (if there are no significant covid related impacts in the intervening period) at the historic levels:*

- *A clawback rate of 50% is to be applied to any balance above guideline in the first year a school exceeds the guideline (after adjusting for exemptions)*
- *A clawback rate of 100% is to be applied to any balance in excess of guideline where the guideline has been breached for two or more consecutive years (after adjusting for exemptions)*
- f) *Noted the underspend on the supply scheme budget at 31 March 2021.*
- g) *Recommended that the scheme reserve be held at the current time to mitigate against the risk of high costs being incurred in 2021/22.*
- h) *Recommended that the supply scheme position be reassessed at March 2022, when judgements could be made about the appropriate level of reserves going forward, if 2021/22/23 has been a stable year for the scheme.*

### *iii. De-Delegation Proposals 2022/23*

Subject to final confirmation of the 2022/23 school funding arrangements by the DfE, it is envisaged that a de-delegation consultation will be issued to maintained primary and secondary schools in early September 2021. This report provided the working group with an opportunity to shape proposals

#### *The Working Group:*

- a) *Noted the report.*
- b) *Supported the de-delegation proposals being included in the consultation with schools, to be issued in September 2021.*
- c) *Requested further modelling around the transition away from lump sums in the charging methodology.*

*The report also includes further impact modelling as requested by the working group*

### *iv. Scheme for Financing Schools in Lancashire*

This report provided information on responses and comments received to a consultation about proposed changes to the Scheme for Financing Schools in Lancashire, some based on updated DfE statutory guidance, plus some locally proposed amendments.

It was noted that approval of scheme amendments is a formal Schools Forum decision and approval will be sought to update the Lancashire scheme as part of the decision making process for the July 2021 Forum meeting.

#### *The Working Group*

- a) *Noted the report.*
- b) *Recommended that the proposed scheme amendments be approved by the Forum*

### *v. Growth Fund Update – 2021 22*

Following Forum approval of amendments to the Growth Fund policy at the last meeting, this report provided an update on expenditure from the fund to date in 2021/22 and highlighted the possible reduced level of funding that would be received in future DSG settlements.

#### *The Working Group:*

- a) *Noted the report.*

vi. *Split Site Criteria Update*

This report sought views on rebasing the level of split site allocations for 2022/23.

*The Working Group:*

a) *Noted the report.*

b) *Supported the uplift of the split site criteria allocations for 2022/23.*

vii. *Schools Forum Annual Report 2020/21*

A draft Forum annual report for 2021/22 was presented for comment.

*The Working Group*

a) *Noted the report*

b) *Recommended to the Schools Forum that the 2020/21 Annual Report be approved for publication.*

**The Forum are asked to ratify the Working Group's recommendations.**

**8. Recommendations from the High Needs Block Working Group**

To consider the recommendations from the High Needs Block Working Group meeting held on 15 June 2021.

i. *Inclusion Service Update*

Dr Sally Richardson, Head of Inclusion Service, attended the Working Group for this item.

A presentation on the Review of SEND Sufficiency was provided with an opportunity for colleagues to comment.,

*The Working Group:*

a) *Noted the information provided on the presentation.*

b) *Expressed some initial comments on the information and asked if the presentation could be circulated to members with the opportunity to provide any further feedback.*

c) *Thanked Sally for the work that had gone into producing the report.*

ii. *Schools Budget Outturn 2020/21*

This report provided information on the Schools Budget Outturn for 2020/21 and the group gave particular consideration to the High Needs Block expenditure.

*The Working Group:*

a) *Noted the report and the 2020/21 Schools Budget final financial outturn position.*

*The report also includes information from a survey conducted by the Society of County Treasurers (SCT) on DSG budget deficits that arrived after the working group meeting.*

iii. *School Balances and Clawback 2020/21*

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*The Working Group:*

- a) *Noted the report.*
- b) *Noted the overall school balances position at 31 March 2021, including the individual school level information provided in the report.*
- c) *Noted the previous Forum decision to suspend the application of clawback at 31 March 2021.*
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- h) *Recommended that the supply scheme position be reassessed at March 2022, when judgements could be made about the appropriate level of reserves going forward, if 2021/22/23 has been a stable year for the scheme.*

iv. *HNB Commissioned Place Process*

This report provided information about possible amendments to the early notification procedure in the HNB commissioned place process for 2022/23.

*The Working Group*

- a) *Noted the report.*
- b) *Supported the proposed changes to the commissioned place process for 2022/23.*

v. *Schools Forum Annual Report 2020/21*

A draft Forum annual report for 2021/22 was presented for comment.

*The Working Group*

- a) *Noted the report*
- b) *Recommended to the Schools Forum that the 2020/21 Annual Report be approved for publication.*

**The Forum are asked to ratify the Working Group's recommendations.**

**9. Recommendations from the Early Years Block Working Group**

To consider the recommendations from the Early Years Block Working Group meeting held on 17 June 2021.

i. *Schools Forum Early Years Block Membership*

This report provided an update on early years PVI membership of the group.

*The Working Group*

- a) *Noted the report.*

- b) *Welcomed Phillipa Perks as one of the formal Schools Forum representatives from September 2021.*
- c) *Thanked Anne Peet for her contribution to the work of the Forum*
- d) *Thanked Peter Hindle for agreeing to extend his membership*

ii. *Funding Agreement for the Provision of Early Education Funding 2021/22, including sector consultation responses on PVI Headcount Dates and Interim Payments Terms*

This report provided information on changes to the Private, Voluntary and Independent Sector (PVI) Funding Agreement, and Schools Sector Memorandum of Understanding for Early Education Funding for the 2021/22 academic year.

*The Working Group:*

- a) *Noted the report, including the feedback from the consultation with the sector*
- b) *Noted that recommendations from the Early Years Consultative Group about PVI Headcount Dates and Interim Payments Terms had been accepted by the county council and built into the updated funding agreement and memorandum of understanding*
- c) *Requested clarification around a small number of amended clauses in the documents*
- d) *Recommended that the county council consider the proposed amendment to the funding agreement arrangements relating to funding for settings that received an Inadequate judgement from OfSTED*

iii. *Funding for local authorities in financial year 2021 to 2022*

An update was provided on DfE announcements around changes to the way the DfE will fund the early years block in 2021/22/

*The Working Group*

- a) *Noted the report*

iv. *Maintained Nursery School (MNS) Review*

This report provided information on review of maintained nursery school provision that was currently taking place.

*The Working Group*

- a) *Noted the report.*

v. *Schools Budget Outturn 2020/21*

This report provided information on the Schools Budget Outturn for 2020/21 and the group gave particular consideration to the Early Years Block expenditure.

*The Working Group:*

- a) *Noted the report and the 2020/21 Schools Budget final financial outturn position.*

vi. *School Balances and Clawback 2020/21*

This report provided information on School Balances and Clawback for 2020/21 and included details of individual school balances at 31 March 2021. Views on future clawback arrangements were sought as part of the report.

*The Working Group:*

- a) *Noted the report.*
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vii. *Schools Forum Annual Report 2020/21*

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*The Working Group*

- a) *Noted the report*
- b) *Recommended to the Schools Forum that the 2020/21 Annual Report be approved for publication.*

viii. *SEN Inclusion Fund*

On 17 May 2021, the latest meeting of the group established to consider matters around the SEN Inclusion fund took place. This report provided an update on key issues.

*The Working Group*

- a) *Noted the report.*
- b) *Welcomed the progress being made on this issue through the task and finish group.*

ix. *Education recovery announcement for early years providers*

It was noted that funding had been made available nationally to assist educationally recovery, which included the provision of £153m for training for early years staff to support the very youngest children's learning and development.

*The Working Group*

- a) *Noted the report.*

x. *Early Career Teachers (ECTs)*

A query was raised at the about whether a private nursery could support an ECT through their two year pathway. Officers agreed to check and confirm the position.

*The Working Group*

- a) *Noted the question raised and that an answer would be circulated to members.*

**The Forum are asked to ratify the Working Group's recommendations.**

**10. Recommendations from the Chairs' Working Group**

To consider the recommendations from the Chairs' Block Working Group meeting held on 22 June 2021.

i. *Schools in Financial Difficulty (SIFD) –Categorisations*

This report provided an update to the Schools in Financial Difficulty (SIFD) categorisations based on March 2021 outturn data.

*The Group:*

- a) *Noted the report and analysis provided.*  
b) *Noted that the Schools Block working group were being presented with a report bout the charging methodology associated with de-delegations including consideration of removing the lump sum element of the charge over time, which could disadvantage small schools.*

ii. *Schools in Financial Difficulty (SIFD) Support Criteria*

This report sought views on proposed changes to SIFD support criteria.

*The Group:*

- a) *Noted the report and the clarification around sustainability plan approvals.*  
b) *Supported the proposed Schools in Financial Difficulty (SIFD) Support Criteria amendments to provide support for schools with an approved sustainability plan.*

**The Forum are asked to ratify the Working Group's recommendations.**

**11. Apprenticeship Levy**

This report provides information arising from the Forum seminar held on 11 May 2021 on the Apprenticeship Levy Pooled Payroll issues.

**12. Urgent Business**

Information is provided on the decisions taken using the urgent business procedure to approve the Forum's response to the DfE Consultation on changes to the payment process of schools' business rates

**13. Oracle Fusion Presentation**

Jon Howard (Head of Payroll Services) and Allison Leach (Payroll Service Manager) Matthew Cornish, (Socitm Advisory Senior Consultant) will attend the meeting to provide information on the Oracle Fusion project

**14. Forum Correspondence**

There is no Forum related correspondence to consider at this meeting.

**15. Any Other Business**

No items of AOB have been notified

**16. Date of Future Meetings**

To note that the next scheduled Forum meeting will be held at 10.00 am on Tuesday 19 October 2021. Arrangements for the meeting will be confirmed in due course.

A copy of the forum schedule of meetings for the 2021/22 academic year is provided. The meetings include a physical venue but may be conducted virtually.