

**LANCASHIRE SCHOOLS FORUM**

**MINUTES OF THE MEETING HELD AT 10:00 A.M. ON TUESDAY, 18 MARCH 2021  
(Virtual meeting via Zoom)**

Present:

**Schools Members:**

**Primary School Governors**

Chris Bagguley  
Stephen Booth  
Michelle O'Neill  
Robert Waring  
Karen Stephens  
Laurence Upton

**Academy Governor**

Chris McConnachie  
Kathleen Cooper  
Louise Shaw

**Primary School Headteachers**

Cathryn Antwis  
Daniel Ballard  
Jenny Birkin  
Neil Gurman  
Keith Wright

**Academy Principal/Headteacher**

Matt Eastham  
Gaynor Gorman  
Alan Porteous

**Alternative Provision Academy**

Stephanie Carter

**Secondary School Governors**

Janice Astley  
John Davey  
Brian Rollo

**Special School Academy**

Louise Parrish

**Special School Governor**

Laura Brennan

**Secondary School Headteachers**

Steve Campbell  
Ivan Catlow  
Mark Jackson

**Special School Headteacher**

Peter Higham  
Shaun Jukes (Chair)

**Nursery School Headteacher**

Jan Holmes

**Short Stay Governor**

Sandra Thornberry

**Nursery School Governor**

**Short Stay Headteacher**

Jane Eccleston

**Members:**

**Early Years - PVI**

Sharon Alexander  
Peter Hindle

**Other Voting Members**

Bill Mann

**Observers**

David Fann (NAHT)  
Sarah Troughton (sub for Ian Watkinson  
(NEU)  
Sam Ud-din (LASGB)

**Observers - Members of the Public**

In attendance: Paul Bonser  
Matt Dexter  
Millie Dixon  
Kevin Smith  
Howard Walsh

### **1. APOLOGIES FOR ABSENCE**

Apologies for absence were received from Sarah Barton, Sarah Callaghan, Thelma Cullen, Tom Cropper, Gill Donohoe, Rosie Fearn, Sally Richards, Karen Stracey and Eleanor Hick

### **2. SUBSTITUTE MEMBERS**

Sarah Troughton (NEU) was present as a substitute for Ian Watkins.

### **3. FORUM MEMBERSHIP**

The Forum noted a number of membership changes since the last meeting, including:

#### *Church of England Diocese*

Bill Mann has been nominated to represent Church of England Dioceses.

#### *Alternative Provision Academy representative*

Stephanie Carter, from Coal Clough Academy is the new Alternative Provision Academy representative.

#### *PRU Headteacher*

Jane Eccleston, from Acorns School, is the new PRU headteachers representative (Jane was unable to attend the January meeting)

#### *Schools Forum Annual Membership Review for September 2021*

The annual membership review has been sent out to school members to check if colleagues wish to continue on the forum from September 2021. It was noted that the census data for January 2021 has been delayed but will be reviewed once it is available to check on the membership balance.

#### **The Forum:**

- a) **Noted the report,**
- b) **Welcomed Stephanie Carter, Jane Eccleston and Bill Mann to the Schools Forum.**

**Individual school members were asked to respond to the membership review request, if they had not already done so.**

### **4. MINUTES OF THE LAST MEETING**

The minutes of the last meeting held on 12 January 2021 were agreed as a correct record.

## 5. MATTERS ARISING

The following matters arising from the minutes of 12 January 2021 were noted:

- *School Teaching and Support Staff Supply Reimbursement Scheme*  
Some technical difficulties had prevented confirmation letters being issued on the normal timetable, but the existing eform links still allow schools to notify the LA of any changes they wish to make for 2021/22 and final confirmation letters will be issued once the IT issues are resolved.
- *Covid workforce fund to support with costs of staff absences in schools and colleges*  
On 10 March DfE notified that the online form for this grant was available, but claims must be submitted by 23:59 on 31 March 2021  
<https://form.education.gov.uk/service/workforce-fund-claim>

**The Forum:**

- a) **Noted the report.**

## 6. RECOMMENDATIONS FROM THE SCHOOLS BLOCK WORKING GROUP

A report was presented setting out the recommendations from the Schools Block Working Group held on 4 March 2021.

### **i. New School Proposals**

*Lynn MacDonald, School Planning Manager, attended working group for this item.*

This report provided additional information about the policy and data around considerations relating to the possible commissioning of a new primary school in the Ribble Valley

*The Working Group:*

- a) *Noted the information provided.*
- b) *Thanked Lynn for the useful background information to help shape the necessary amendments to the Forum growth fund policy.*

**The Forum ratified the Working Group's recommendations.**

### **ii. Growth Fund Policy Update – New Schools**

This report was linked to the previous item and provided an update on the School Growth Fund policy proposing amendments related to support for new schools. A copy of the proposed new policy was provided with the report.

It was noted that officers had considered the start up costs and diseconomies of scale costs associated with establishing a new school and considered information from other LAs that had been through the commissioning procedure for a new school using the free school presumption process .

The addition to the Growth Fund policy relating to a new primary school was supported by the group.

*The Working Group:*

- a) *Noted the report.*
- b) *Supported the new school addition to the Lancashire Growth Fund policy.*

## **The Forum ratified the Working Group's recommendations.**

### ***iii. School Block Funding 2021/22***

An update was provided about the finalisation of the Schools Budget setting process for 2021/22, culminating in the issuing of individual school budget in February 2021

It was noted that the LCC Cabinet had approved the Schools Budget proposals for 2021/22 on 14 January 2021. Schools Block proposals were then submitted to ESFA for compliance checking, and once approved, individual school budgets were issued on 22 February

The DfE had also reconfirmed that PPG rates for 2021/22 will remain as they were in 2020/21, however DfE will be using October 2020 school census data to calculate pupil premium allocations for 2021/22 onwards (except for alternative provision and pupil referral units where eligibility will continue to be based on the January census). This change was introduced to bring the pupil premium in line with how the rest of the core schools' budget is calculated and will provide both schools and DfE with greater certainty around future funding levels earlier in the year.

A DfE consultation on the introduction of a 'hard' national funding formula is expected shortly.

*The Working Group:*

*a) Noted the report.*

## **The Forum noted the report.**

### ***iv. Inclusion Hub Funding***

This report dealt with proposals for Inclusion Hub allocations in 2021/22 and provided an update on key developments and challenges in 2020/21.

The Schools Forum had again voted to de-delegate funding for primary inclusion hubs in 2021/22. It was proposed to continue the methodology agreed for 2020/21 for allocating funding to districts, using a NOR plus derivation calculation. District allocations are very similar to those for 2020/21, with 5 districts receiving marginally higher allocations and 6 slightly lower allocations. The largest change for a single district is circa £1.5k.

Supplementary information was provided giving an update on the work of Inclusion Hubs. The Inclusion Hub Steering Group were keen to keep Forum involved in the work of the Hubs as it progresses, and a February 2021 update was shared with the group. The report included sections on:

- Summary of key challenges and key successes
- Vision
- Structure and accountability
- District offers in summary
- Indications of impact (suggestions for ongoing reviews)
- Next Cross-District Steps (2021-22)

Members appreciated the update, especially given the current pressures on schools, and gave careful consideration to the information provided. The positive impacts report from

some districts, despite the challenges faced by the projects during 2020/21, were welcomed. Whilst it was acknowledged that individual districts were developing local strategies, comment was made that some consistency around outcome measures in reports would assist in evaluating the impact of the initiatives across district and assessing value for money.

It was noted that the county council was establishing a Lancashire Education Partnership Board, which would include school representatives and would take a strategic overview of education provision across the county and would seek to coordinate the work of various initiatives.

It was also noted that further updates will be presented to the Forum in due course about the operation of the hubs, and the Forum will need to make formal decisions in October 2021 about de-delegation options for 2022/23.

*The Working Group:*

- a) *Noted the report.*
- b) *Supported the methodology for allocating 2021/22 Inclusion Hub funding to districts.*
- c) *Asked that feedback be provided to the Inclusion Hub Steering Group to help inform future reports.*

**The Forum ratified the Working Group's recommendations.**

**v. *Schools national funding formula: changes to the sparsity factor in 2022-23***

The DfE issued a consultation on Schools national funding formula: changes to the sparsity factor in 2022-23. Information and analysis of the implications for Lancashire were provided, together with an opportunity for members to express initial views. Initial comments on a possible consultation response were included in the papers.

*The Working Group:*

- a) *Noted the report.*
- b) *Noted that a draft Forum consultation response would be presented to the 18 March 2021 meeting, incorporating views expressed to date.*
- c) *Requested that diocesan authorities and primary and secondary schools should be alerted to the consultation.*

***Subsequent to the Working Group meeting mainstream schools and diocesan authorities had been alerted to the consultation.***

***A draft forum response was presented to the Forum for approval.***

**The Forum**

- a) **Noted the additional information provided.**
- b) **Ratified the draft Forum consultation response.**

**7. RECOMMENDATIONS FROM THE HIGH NEEDS BLOCK WORKING GROUP**

A report was presented setting out the recommendations from the High Needs Block Working Group meeting held on 2 March 2021.

### ***i. High Needs Block Funding***

An update was provided about the finalisation of the HNB budget setting process for 2021/22, culminating in the issuing of individual school budget in February 2021. Information was also included on other matters relating to 2021/22 school funding and future consultations

*The Working Group:*

- a) *Noted the report.*

**The Forum noted the report.**

### ***ii. High Needs Block Termly Redetermination Process***

During the summer and autumn terms 2020, the Forum has supported the application of protections for special schools and pupil referral units in the termly budget redeterminations, to provide some mitigation against NOR reductions caused by COVID-19. This report set out information on support provided and sought views on the arrangements for the spring term 2021

*The Working Group:*

- a) *Noted the report and the further information.*
- b) *Recommended that protections are applied to the HNB spring term 2021 redetermination process to mitigate the impact of COVID-19 for any special schools or PRUs with a reduced NOR in the January 2021 count.*
- c) *Supported the issuing of an eform to special schools to collect January census data to enable spring term redeterminations to be actioned on time.*
- d) *Supported further investigation into possible funding implications around the teachers pay and pensions methodology for PRUs and any possible protection that could be provided for 2021/22.*
- e) *Requested that the involvement of maintained nursery schools in Inclusion Hub discussions be raised with relevant Directors.*
- f) *Noted that wider strategic considerations around PRUs was being taken forward by the Alternative Provision Steering Group.*

***In response to the Working Group recommendations, the following information was provided for the Forum.***

#### ***• HNB redeterminations***

***As a continuation of existing policy, HNB redeterminations were issued in the week commencing 8 March 2021, incorporating NOR data provided from special schools via a separate eform. Officers expressed thanks to the WG chair for circulating the request for information and to special schools for their prompt responses.***

#### ***• PRU Pay and Pensions***

***Since the meeting, the LA had been considering the PRU Pay and Pensions representations. Officers were sympathetic to the representations made, given that PRU pupil numbers may be lower in 2021/22 budgets as a result of COVID-19 implications.***

***As PRU's school specific places do not include intervention places, it was proposed that protection could be applied to the PRU pay and pensions methodology for 2021/22, by including intervention places, This figure would change each term***

***depending on data, but would top up the allocations for PRUs in 2021/22 and provide some protection against the current reduced numbers in PRUs.***

***Initial analysis suggests that this methodology would generate circa £95k of additional pay and pensions allocations to PRUs in 2021/22, although there were school by school variations. This overall figure would likely increase throughout the year, if intervention placements increase as expected.***

***Decisions about the longer term methodology for teachers pay and pensions allocations could be considered alongside any other funding proposals that emerge from the AP Strategy Group.***

- ***Post-16 Places in special schools***

***Members feedback that it was anticipated that there would be considerable pressures on post-16 places in special schools in the next academic year, as more young people appeared to be applying to continue their post-16 education in their existing special school, a number of whom may have traditionally applied to a FE college.***

#### **The Forum**

- a) Noted the additional information provided.***
- b) Ratified the Working Group's recommendations.***
- c) Supported the proposals offering additional protection to PRUs in 2021/22 by incorporating intervention places in the Pay and Pensions calculation.***
- d) Noted that this protection would be redetermined each term from 2021/22.***
- e) Noted that the longer term methodology for teachers pay and pensions allocations could be considered alongside any other funding proposals that emerge from the AP Strategy Group.***

#### ***iii. Review of national funding formula for allocations of high needs funding to local authorities: changes for 2022-23***

On 10th February 2021, the DfE launched a consultation on the 'Review of national funding formula for allocations of high needs funding to local authorities: changes for 2022-23'. This report provided information on the proposals and offered an opportunity for members to shape a Forum response.

It was noted that the consultation was fairly limited in scope and was seeking views on some possible changes to two specific factors in the high needs national funding formula for 2022/23. The DfE indicated that this consultation formed the first stage of the review of the high needs national funding formula, and that future consultations will cover further proposals for changes to the formula and to the arrangements for the funding for SEND and AP

#### ***The Working Group:***

- a) Noted the report.***
- b) Expressed some initial views on the consultation.***

***Individual members were asked to consider any further comments on the consultation and inform the LA.***

***A draft forum response was presented to the Forum for approval.***

#### **The Forum**

- a) **Noted the report.**
- b) **Ratified the draft Forum consultation response.**

#### ***iv. Alternative Provision Strategy Group Update***

A brief verbal update was provided for members on the work of the Alternative Provision Strategy Group.

It was confirmed that the AP strategy group, which include representatives from PRUs, special schools, mainstream schools and FE colleges, in addition to relevant LCC officers, was meeting regularly. The Group was making progress and work was being undertaken in the background. Considerable engagement with the sector representatives was reported and considerations were linking in with other appropriate initiatives like Inclusion Hubs and the team around the school.

*The Working Group:*

- a) *Noted the report.*

**The Forum noted the information.**

### **8. RECOMMENDATIONS FROM THE EARLY YEARS BLOCK WORKING GROUP**

A report was presented setting out the recommendations from the Early Years Block Working Group meeting held on 9 March 2021.

#### ***i. SEN Inclusion Fund***

*Dr Sally Richardson, Head of Service for the Inclusion Service, attended the Working Group meeting for this item, and the SEND Partnership: Ofsted Revisit report.*

A number of issues have previously been raised with the Inclusion Service in connection with support for SEN children in early years. In response to this, an SEN working group had been established with the service to consider some of the key issues, and this meeting provided an opportunity to discuss progress with the Head of Service.

Key issues raised included:

- The impact of COVID and lockdowns on children attending early years providers
- The lead professional role falling on the early years providers who no longer have capacity to undertake this
- The alignment of forms and data requests across the services
- Utilising data/completed forms by services that already had involvement with children before they started nursery, e.g. portage or speech and language services
- Concern that SEN Inclusion Funding was limited to 2 terms support and was often insufficient to meet the cost of support provided
- Also, the Inclusion Fund only covered support related to 15 hours universal and not the extended 30 hours
- Concern about the access to the Inclusion fund for childminders
- Suggestion that the team around the school philosophy be extended to the team around the early years provider



It was suggested that some of the issues being raised around the CAF/TAF and the lead professional role falling on the early years providers could be discussed at a CAF conference scheduled for 22 March 2021.

*The Working Group:*

- a) *Noted the report*
- b) *Asked that officers consider the views expressed at the meeting.*

***After the Working Group meeting additional invitations had been sent out to EYBWG members from the Children and Family Wellbeing service for the 22 March conference.***

**The Forum**

- a) **Noted the report and the additional information.**
- b) **Ratified the Working Group's recommendations.**

### ***ii. SEND Partnership: Ofsted Revisit***

At the last working group meeting, members asked if there was any feedback from the OfSTED SEND inspection of the Authority, to which some colleagues had contributed. An update from the Inclusion Service was provided.

Some of the important improvements the inspectors had found included:

- Provision for SEND is a priority for leaders;
- Strong working relationships across the partnership;
- Clear quality assurance systems in place;
- Good practice being shared across the area; and
- Improved outcomes for children and young people.

The report highlighted five areas for continued targeted improvement work, which were:

- Continuing to improve our understanding about the local area;
- Further developing and evaluating our commissioning arrangements;
- Improving the effectiveness of the new neuro-developmental pathway;
- Improving transition arrangements in 0 to 25 healthcare services; and
- Implementing the changes to the Local Offer.

It was noted that a 6 monthly review of progress with Ofsted and Care Quality Commission (CQC) was scheduled for 24 March 2021.

*The Working Group is asked to:*

- a) *Note the report.*

**The Forum noted the report.**

### ***iii. Early Years Block Funding***

At the last working group meeting, members supported a letter being sent to the Schools Forum to highlight the significant pressures being faced by the sector and asking for consideration of three measures:

An update was provided in connection with the 3 issues raised in the correspondence:

- **Funding for the 2021 spring term, with at least a similar measure as applied this term in comparing it with spring 2020;**

The DfE had confirmed that funding for early years for the spring term 2021 would be purely on the basis of the January 2021 census data.

The DfE did say that there is some protection that will be provided to local authorities in exceptional circumstances and including a threshold of 85% of January 2020 levels and Lancashire expects to be above that point.

It was noted that there were also considerable risks for the DSG in the current census and funding arrangements for the spring term 2021, as this data will be used by the DfE in the calculation our early years block funding. If census levels are low, but then rise in the summer term 2021, the funding to pay for any significant uplift in numbers will need to be found from the DSG reserve.

Initial analysis of the spring term 2021 data compared to spring 2020 indicates that funded hours fell by 6.7% overall. The table below provides further details, and, as can be seen, there is a more significant impact on 2 year old hours.

<b>Change in EEF Total Funded Hours Claimed @ 23.2.2021</b>				
<b>PVI Sector</b>				
<b>Funding Type</b>	<b>Spring 2020</b>	<b>Spring 2021</b>	<b>Change</b>	<b>% Change</b>
2 Year Old	468,022	374,689	-93,332	-19.9%
34 Year Olds	3,479,576	3,309,185	-170,391	-4.9%
<b>Total</b>	<b>3,947,597</b>	<b>3,683,874</b>	<b>-263,723</b>	<b>-6.7%</b>

However, this comparison only includes PVI data at this point, due to delays in the availability of maintained census data. Also, the spring 2021 hours do not include any supplementary claims.

For information, additional top up payments were made to providers in January 2021, totalling circa £4.2m.

It was noted that representations were being made to the DfE on this issue.

- **A one off Covid support payment for each setting;**

Following a consultation, Forum supported the proposals for a one-off lump sum payment to be made in the spring term 2021 of £250 for childminders and £1,000 for other early years providers that had not been able to access additional DfE covid support for schools, to assist them with covid related costs.

One-off covid payments were therefore issued to relevant providers in January 2021, in accordance with the proposals and totalling over £0.6m.

One key issue that emerged in the consultation related to requests for support for Lancashire early years providers not offering Government funded hours. It was recognised that these providers were still incurring covid costs and the county council was able to identify some additional funding from LCC monies to enable an offer of a £250 one-off covid payment to be made to the non-Dedicated Schools Grant settings.

To receive this additional payment, providers must have an open registration with Ofsted and not have received the one-off lump sum funded through DSG reserves.

As the county council does not hold bank details for non-DSG settings, information was issued in the week commencing 22 February 2021 asking eligible providers to complete an application form in order to claim the payment. The deadline for receipt of claims was set as 5 March 2021 and we will aim to process payments by the end of March 2021, or as soon as possible thereafter.

It is estimated that these payments will total circa £0.1m.

- ***Additional funding for the whole of the next financial year.***

As agreed at the last meeting, following a consultation, a transfer of circa £2m from the Schools Block to the Early Years Block was agreed to help mitigate the impact of pressures on that block.

This enabled, for one year only, support to enable the increase in Government funding to be passed on in full and to continue the additional local increases facilitated by the similar transfer last year. This was included in 2021/22 budgets issued to providers on 22 February 2021

For MNS, the DfE Dedicated Schools Grant allocations to local authorities (LAs) indicate that the MNS supplementary funding allocations for September 2021 to March 2022 are conditional. DfE say these allocations may be subject to change and LAs should therefore treat them as unconfirmed.

Further information will be provided on any DfE proposals as soon as we are able. The Government did confirm that their commitment to the long-term funding of maintained nursery schools is unchanged.

Members thanked the county council and Forum for the local response to the pressures facing the sector, although it was noted that pressures on the DSG in future years meant that the £2m schools block transfer was unlikely to be available again in future years. The county council support for sector covid testing was also highlighted as another welcome policy implemented in Lancashire.

Some concern was expressed around the 2 year old take up figures shared with the group, and it was noted that a detailed paper on the response to this data was due to be considered by the Early Years Consultative Group.

*The Working Group:*

a) *Note the report.*

**The Forum noted the information provided and the positive feedback that had been received from the sector about the support provided in Lancashire.**

#### ***iv. Interim EEF Payments***

In order to support the sustainability and cash flow of early years providers during the pandemic, instead of 3 payments each term, the local authority has made 2 payments instead. The changes to interim payments during the course of the pandemic have been very

positively received and appreciated by the sector. A decision needs to be taken on the future basis for calculation of interim payments from autumn 2020-21 onwards.

*The Working Group:*

- a) *Noted the report:*
- b) *Recommended that the sector be consulted on the future options for interim payments.*

**The Forum:**

- a) **Noted the information provided.**
- b) **Ratified the Working Group's recommendations.**
- c) **Noted that a consultation will be issued to providers, and proposals need to be finalised to ensure they comply with accounting procedures.**

**v. *Executive Recovery Board***

The Working Group chair fed back from recent Executive Recovery Board meetings, emphasising that awareness about the important role played by the early years sector had been enhanced through this process

*The Working Group:*

- a) *Noted the report.*

The Forum Chair report on recent discussions with LCC Directors around a proposal to change the role of the ERB and create an Education Partnership Board. The link between the Schools Forum and this new board was emphasised, with the intention of working collaboratively to ensure that priorities were closely aligned and funding decisions could be taken to support key policy objectives.

**The Forum noted the information provided.**

## **9. RECOMMENDATIONS FROM THE CHAIRS' WORKING GROUP**

A report was presented setting out the recommendations from the Chairs' Block Working Group meeting held on 2 March 2021.

**i. *DSG Historic Commitments***

A report was presented that considered the options for a possible continued DSG funding contribution towards services that were previously funded for the 'historic commitments' element, which DfE are reducing/ceasing

Enquires of DfE confirmed that the funding previously allocated from 'historic commitments' could be funded from DSG going forward, if agreed by Forum, including

- Emotional Health and Wellbeing Service - £200k
- MASH - £150k

Members recommended that service representatives for MASH and Emotional Health and Wellbeing be invited to attend the full Schools Forum meeting in July 2021 and to present information about what any future DSG funding would provide, including information on value for money for schools and to set out what the impact for schools and pupils if these services were discontinued

*The Working Group:*

- a) *Noted the report.*
- b) *Asked that services be invited to present information to the July 2021 Schools Forum meeting.*

**The Forum ratified the Group's recommendations.**

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

Regular reports have been presented to the Chairs' Group/Forum around Schools in Financial Difficulty (SIFD) categorisations, and an updated analysis was provided for the group, which was based on the county council's forecasts of the outturn position for schools at 31 March 2021, taken from data in the LCC accounts at 31 December 2020.

The analysis is provided below:

<b>Category</b>	<b>No. of schools</b>	<b>%</b>
1	4	0.7%
2	18	3.2%
3	36	6.3%
4	511	89.8%
	569	

It was noted that:

- The number of schools in Category 1, Structural Deficit, had reduced by one since that last report, due to the closure of a secondary school that had a substantial structural deficit.
- In percentage terms the current analysis represents 10.2% of schools identified with some level of financial challenge, compared to 18.1% in the previous report;
- This does represent a more positive outlook for school funding overall, but there are still significant uncertainties around school funding, especially when unpredictable covid-19 related costs are factored in, and many schools may continue to face financial challenges.

An analysis and comparison data by sector were also provided to the group. In the sector data small primary schools, PRUs and nursery schools were identified as those phases facing specific challenges. It was noted that some of the higher risk sectors may have faced additional pressures due to COVID-19 issues, for example reduced income.

It was also confirmed that reviews were taking place in some areas, for example in connection with the AP strategy and the review of maintained nursery schools.

In addition, the county council was establishing a Lancashire Education Partnership Board, which would include school representatives and would take a strategic overview of education provision across the county. The importance of Schools Forum linking into outcomes from this group were emphasised, so that funding and strategic priorities were aligned. To assist with this process, it was suggested that a dialogue could take place through the chairs' group initially.

The SIFD categorisation will be run again, based on the actual outturn position of schools at 31 March 2021, and SIFD support will continue to be provided to any school in financial difficulty.

*The Working Group:*

- a) *Noted the report and information provided.*
- b) *Welcomed the proposal to link in with Schools Forum to align with strategic priorities.*
- c) *Noted that the SIFD categorisation would be rerun when the actual outturn data for 31 March 2021 was available.*

**The Forum ratified the Working Group's recommendations.**

## **10.RECOMMENDATIONS FROM THE APPRENTICESHIP LEVY STEERING GROUP**

A report was presented setting out the recommendations from the Apprenticeship Levy Steering Group meeting held on 8 February 2021.

### ***i. Urgent Business Apprenticeship Levy Transfer Protocol***

It was noted that responses were obtained from the Steering Group in February 2020 using the urgent business procedure, in connection with the protocol to be used to in connection with the transfer of 'schools' monies, to non-levy paying settings rather than returning funding to central government.

The agreed proposals were:

Categories eligible for 'Schools' Apprenticeship Levy Transfer:

- Aided schools situated with the LCC footprint (where possible as limited number due to PAYE issue)
- Academies situated with the LCC footprint
- Aided schools and academies in Unitary authorities (Blackpool and Blackburn)
- Independent Nurseries/Early years settings

Process:

- Allow the Apprenticeship Levy Team to identify, arrange and authorise unspent levy transfers to be made to the above categories.

*The Working Group:*

- a) *Noted the report.*

**The Forum noted the report.**

### ***ii.School Apprenticeship Levy Update***

Colleagues from the Apprenticeship Levy team delivered a presentation to members providing an update on the latest school related developments. Key issue issues included:

- A regular financial update
- Pooler Payroll  
The significant barrier still exists to utilising the transfer where eligible schools using LCC payroll, and therefore on the same PAYE number cannot be supported. However, the team have recently got some assurances from the ESFA that a solution to the pooled payroll issue will be resolved for April 2021

- **Looking Forward**

The key issue for the team in the near future will be the large Procurement exercise that will provide the opportunity to look at the offer to support schools and engage with potential new programmes (become a trailblazer) and providers.

The team are also proposing a newsletter to introduce the new team supporting schools apprenticeships.

*The Working Group:*

- a) Noted the information.*
- b) Requested that the transfer opportunity be promoted with early years providers.*
- c) Welcomed the possibility of pooled payroll issue being resolved for April 2021.*
- d) Thanked the Apprenticeship Levy Team for their continued hard work and dedication during difficult circumstances.*

**Subsequent to the Steering Group meeting, it was note that limited progress had been made on the pooled payroll issues impacting on aided and foundation schools that purchase payroll from BTLS, and time was running out on ahead of 1 April 2021.**

**A posting had been issued on the schools portal to inform schools of this situation, and asking schools that were impacted to complete an eform, so that they could be contacted directly in the event of significant developments.**

**The Forum were informed that the ESFA had recently provided some options to the Apprenticeship team, and these needed to be assessed, but it appeared that there were some concerns associated with all the options.**

**The Forum**

- a) Note the report and the supplementary information.**
- b) Ratified the Steering Group's recommendations.**

**11.URGENT BUSINESS**

No items had been considered using the Forum's Urgent Business procedure since the last Forum meeting.

**12.FORUM CORRESPONDENCE**

No items of Forum correspondence had been received since the last meeting.

**13.ANY OTHER BUSINESS**

**a) DfE Consultation Changes to the payment process of schools' business rates**

On 10 March 2021, the DfE issued a consultation on Changes to the payment process of schools' business rates. A copy of the consultation was provided with the papers. The Forum meeting provided an initial opportunity to express views on the DfE proposals

The DfE proposal was basically for DfE to top slice funding and pay all school and academy business rates centrally before DSG allocations come to LAs. The costs for schools and the LA should be the same under this new arrangement and its introduction

will reduce the administrative burden for schools and pave the way for the introduction of the DfE's hard national funding formula.

Initial analysis suggests that for 90%+ of schools and academies there are no financial implications, plus removes the risk around funding at individual school level. For the rest the implications should be positive, but I am sure that as part of the current process some schools are being over funded, which this should also remove.

Members expressed some initial views and noted that a draft forum response would be circulated for approval using the Forum Urgent Business Procedure, ahead of the consultation closing date of 5 May 2021.

#### **The Forum**

- a) **Noted the report.**
- b) **Noted that a draft forum response would be circulated for approval using the Forum Urgent Business Procedure.**

#### **14. DATE OF FUTURE MEETINGS**

It was noted next scheduled Forum meeting will be held at 6 July 2021. Arrangements for the meeting will be confirmed in due course, which is likely to be a Microsoft Teams meeting.