

LANCASHIRE SCHOOLS FORUM

**MINUTES OF THE MEETING HELD AT 10:00 A.M. ON TUESDAY, 19 OCTOBER 2021
(Virtual meeting via Microsoft Teams)**

Present:

Schools Members:

Primary School Governors

Stephen Booth
Gerard Collins
Michelle O'Neil
Karen Stracey
Tim Young

Primary School Headteachers

Cath Antwis
Angela Aspinwall-Livesey
Daniel Ballard
Sarah Barton
Jenny Birkin
Neil Gurman
Sarah Robson
Keith Wright

Secondary School Governors

John Davey
Gill Donohoe
Jackie Lord
Brian Rollo

Secondary School Headteachers

Ivan Catlow
Mike Wright

Nursery School Headteacher

Jan Holmes

Nursery School Governor

Early Years - PVI

Sharon Fenton
Peter Hindle
Philippa Perks

Academy Governor

Kathleen Cooper
Louise Shaw

Academy Principal/Headteacher

Matt Eastham
Gaynor Gorman
James Keulemans
John Tarbox

Alternative Provision Academy

Special School Academy

Special School Governor

Laura Brennan

Special School Headteacher

Shaun Jukes – Forum Chair
Claire Thompson

Short Stay Governor

Liz Laverty

Short Stay Headteacher

Members:

Other Voting Members

CC Anne Cheetham
Rosie Fearn
Bill Mann

Observers

Matthew Cornish (Socitm)

Mark Evans (Unison)

CC Michael Goulthorp

Steve Jones (NASUWT)

Amber Ludlam (ESFA)

Susan McGrath, Head Teacher at Carleton Green Community Primary School

Sam Ud-din (LASGB)

Ian Watkinson (NEU)

In attendance: Paul Bonser
Martin Clarkson
Matt Dexter
Millie Dixon
Jon Howard
Pita Oates
Kevin Smith

1. ELECTION OF FORUM CHAIR

Shaun Jukes was elected as Chair of the Schools Forum for the 2021/22 and 2022/23 academic years.

2. ELECTION OF FORUM VICE-CHAIR

Stephen Booth was elected as Vice-Chair of the Schools Forum for the 2021/22 and 2022/23 academic years.

3. APOLOGIES FOR ABSENCE

Apologies were received from Janice Astley, Chris Bagguley, Steve Campbell, Thelma Cullen, Helen Dicker, Phil Hart, Julie Langham, Deanne Marsh, Jennifer Mein, Louise Parrish and Alan Porteous, Sally Richardson, Karen Stephens, Laurence Upton and Robert Waring.

4. SUBSITUTE MEMBERS

No substitute members were in attendance.

5. FORUM MEMBERSHIP

A number of new members were welcomed to the Forum from September 2021, including:

Primary School Governors

- Daniel Baron, St Bartholomew's CE Primary School
- James Johnstone, Barrow URC Primary School
- Tim Young, Howick CE Primary School, Penwortham

Primary School Headteachers

- Angela Aspinwall-Livesey, St. John's Catholic Primary and Hillside Community Primary School
- Anna Smith, Burscough Village Primary School
- Sarah Robson, Ribby with Wrea Endowed CE Primary School

Secondary School Governor

- Jackie Lord, Penwortham Girls' High School

Private, Voluntary and Independent (PVI) providers of early years education

- Sharon Fenton, Rosy Apple Childcare Ltd
- Philippa Perks, University of Cumbria Pre School Centre

Short Stay School Governor

- Liz Lavery Shaftesbury High School

NASUWT Representative

- Steve Jones

Special School Headteacher Representative

- Claire Thompson, Headteacher at Moorbrook School

Secondary Headteacher

- Mike Wright, Headteacher at St Augustine's RC High School, Billington

Director of Education, Culture and Skills

- Julie Bell, Acting Director of Education, Culture and Skills

The Forum also thanked a number of other colleagues who were leaving/left the Forum, including:

- Sharon Alexander, Early Years Representative
- Eric Harrison, NASUWT Representative
- Peter Higham Special School Headteacher Representative
- Sarah Callaghan, Director of Education, Culture and Skills

The Forum welcomed new members to the first meeting and thanked those members that had left.

6. MINUTES OF THE LAST MEETING

The minutes of the last meeting held on 6th July 2021 were agreed as a correct record.

7. MATTERS ARISING

There were no Matters Arising from the minutes of the meeting held on 6 July 2021 that were not covered elsewhere on the agenda.

8. TEAM AROUND THE SCHOOL AND SETTING (TASS)

Pita Oates Designated Lead for TASS attended the Forum for this item

A presentation was delivered to the Forum on the latest Team Around the Schools and Setting (TASS) developments.

It was confirmed that the TASS locality board and governance arrangements are now in place and the first boards are to take place throughout October. A TASS charter had also been completed.

A TASS suite of documents and accompanying directories and 'Single Points of Contacts' information had been produced for all ICP footprints. Information was also being issued in a TASS newsletter, of which 3 editions have now been published and distributed.

It was noted that the TASS website and portal page was being completed and should be available for early November.

A number of key TASS issues were emerging and included:

- TASS collaboration with the EP service to develop a pathway for children not accessing education due to emotionally based school avoidance issues (EBSA)
- TASS response to reviewing arrangements for children and young people not accessing fulltime equivalent provision (PME) and on roll at a school – in partnership with CSC, CFW, Schools and Education Services
- TASS response to lack of exam centres for EHE
- TASS development of guidance for schools re. part time timetables
- Child's voice focus group work (Chadwick and McKee)
- CC's project work – pupil cohorts identified. Parental consent next steps
- Delivery of information sessions on EHE guidance and updates for partners
- Information sharing session with CSC Transformation Team and TASS Locality Boards
- Interconnectivity across the CSP – WL, Rossendale.

Some school representatives commented that they were not aware of many of the developments, which footprint they are aligned to or how to get involved. It was noted that the delay to the launch of the website/portal pages had hampered communications with schools and it was hoped that the initial difficulties would soon be resolved allowing schools easy access to much more information.

A number of other questions were raised, and it was agreed that responses could be coordinated outside of the meeting and also suggested that it would be helpful if a further TASS update could be presented to a future Forum meeting.

The Forum

- a) Note the information provided;**
- b) Requested that further information in response to comments and queries raised be shared with the Forum and further presentations be made to future meetings.**

9. RECOMMENDATIONS FROM THE SCHOOLS BLOCK WORKING GROUP

A report was presented setting out the recommendations from the Schools Block Working Group held on 21 September 2021.

i. Government response to schools' business rates consultation

Steve Little, Principal Estates Surveyor, attended the working group meeting for this item.

In Spring 2021, the Forum had submitted a response to a DfE consultation on Changes to the payment process of schools' business rates and the DfE have published their response to the consultation.

The DfE document indicates that there was general support for the proposals and confirmed that the Government intends to proceed with their proposals to centralise the business rates payment system for schools from April 2022.

This will involve ESFA paying billing authorities directly on behalf of state funded schools, removing schools from the payment process, meaning rates funding will be removed from school block budgets. It was noted that this process change would assist the DfE's objective of moving to a hard national funding formula.

The Government response to the consultation indicated that four issues were raised in the consultation, where the DfE have changed their approach as a consequence of responses received. Two of these issues related to matters included in the Forum consultation submission, relating to the availability of an online business rates portal so schools/LAs can access their data and confirmation that ESFA will pay any penalty charges for missed or late payments that are a result of ESFA errors.

Other matters were raised in the Forum response that did not prompt any changes to the government proposals. It was noted that the vast majority of special schools receive full rate relief because of providing for persons with a disability, so are not charged rates, and DfE have assessed maintained nursery schools as out of scope of the new centralised business rates system at the present time. No specific reference is made to PRUs or AP academies that were also referenced in the Forum response.

Another key concern in our submission related to where schools share sites with other bodies. DfE confirm that they will adopt a process where they cover additional rates costs associated with buildings on a school site which are used to deliver education for pupils at the school (a sports hall that is used by pupils during lesson time and in the evenings by the wider community, for example). However, DfE will not cover the additional rates costs associated with buildings which are not used to deliver education for pupils at the school (a children's centre, for example).

The DfE are encouraging schools to register buildings which are not used to deliver education for pupils at the school as a separate entity on the Valuation Office Agency's (VOA) rating list, thereby ensuring that two individual bills are generated.

Steve Little discussed the consequences of this change with members and it was noted that further clarification is still required about how the new system will operate in practice and around some of the practical implications for schools and the estates team at LCC. Steve indicated that schools could contact him with any specific rates queries they may have.

It was also confirmed that the Forum's current Rate Reimbursement Policy would no longer be applicable from April 2022.

The Working Group:

- a) *Noted the report and that further information should be made available in due course.*

The Forum noted the report.

ii. Service De-delegations 2022/23

Information was provided about 2022/23 de-delegation proposals and the consultation with schools

The working group supported the 4 services being included in annual de-delegation consultation with schools, and following consideration of the options and further impact modelling that was presented to the Forum, it was recommended that the 'Staff Costs and 'Support for Schools in Financial Difficulty' de-delegations should introduced a revised charging structure. The amended structure would cease the use of a lump sum element in the charging methodology for these 2 services and move to a purely number on roll (NOR) based calculation in order to offer more equitable arrangements for smaller schools. However, in order to minimise turbulence, the Forum recommended that for 2022/23, the lump sum element should be reduced by 50% only, with the corresponding increase in NOR rates.

Proposals for the Heritage Learning Service and Inclusion Hubs de-delegations held charges at the 2021/22 levels.

The working group supported the operation of the de-delegation voting at the Forum, which would take place at the meeting if there were unanimous or clear decisions, but if views were split, voting would take place via an eform after the meeting , so a formal record is available and to ensure voting is restricted to those eligible under each decision.

The Working Group is asked to:

- a) *Noted the report;*
- b) *Noted that de-delegation papers would be circulated to members after the meeting;*
- c) *Noted that consultation responses would be presented to the Forum meeting on 19 October 2021 and that the Forum would be asked to formally consider de-delegation decisions for 2022/23.*
- d) *Supported the proposed de-delegation voting arrangements.*

Subsequent to the meeting, copies of the 2022/23 service de-delegations and schools block funding formula full consultation document and the summary document were circulated to members and copies were provided with the Forum papers.

Analysis and comments from the consultation responses were presented to the Forum meeting on 19 October 2021 and members considered the responses in relation to each proposal primary and secondary school members of the Forum then voted on each de-delegation proposal.

The Forum:

- a) **Noted the report and the de-delegation consultation analysis and comments;**
- b) **Primary school members voted on each of the possible de-delegations affecting primary schools and secondary school members voted on each of the possible de-delegations affecting secondary schools, as set out below:**

i.	Primary school members unanimously voted to de-delegate Staff costs – Public Duties/Suspensions for primary schools in 2022/23, at 2021/22 levels.
ii.	Secondary school members unanimously voted to de-delegate Staff costs – Public Duties/Suspensions for secondary schools in 2021/22, at 2020/21 levels.

iii.	Primary school members unanimously voted to de-delegate the Heritage Learning Service for primary schools in 2022/23.
iv.	Primary school members unanimously voted to de-delegate Schools in Financial Difficulty, for primary schools in 2022/23.
v.	Secondary school members unanimously voted to de-delegate Schools in Financial Difficulty, for secondary schools in 2022/23.
vi.	Primary school members unanimously voted to de-delegate the Primary Inclusion Hubs for primary schools in 2021/22.

- c) Whilst the primary school representatives on the Forum unanimously supported the continued Inclusion Hub de-delegation for 2022/23, they noted that there were some inconsistencies with the level of satisfaction expressed in the arrangements across districts and the Forum asked that efforts be made to ensure that there is a consistent level of provision and the sharing of best practice across the county.

iii. Schools Block Funding Arrangements 2022/23

On 19 July 2021, the DfE made announcements about the 2022/23 school funding arrangements.

National Funding Formula (NFF) 2022/23

The basic structure of the National Funding Formula (NFF) remains unchanged for 2022/23, but DfE have increased factor values using the additional funding available from April 2022 and made some other minor changes to the arrangements, including

- Increases for 2022/23 Schools Block factors include a 3% rise to many factors, except premises and Free School Meals and a 2% rise to the funding floor and the minimum per pupil levels.
- The Sparsity factor has been amended to increase the funding levels provided, changing schools sparsity distances calculations so that they are now based on road distances, instead of straight-line distances, and introducing a sparsity distance taper.
- Data changes in the NFF will reflect the fact that tests and census s in 2020 were cancelled due to the pandemic so previous years data will be used.

Local Schools Block Formula 2022/23

The Forum have previously agreed that Lancashire will adopt the NFF factors and values as the local funding formula. However, a degree of local discretion remains about the level of the **Minimum funding guarantee (MFG)**. LAs have the freedom to set the MFG in local formulae between +0.5% and +2% per pupil.

Views will be sought from Lancashire primary and secondary schools and academies in the consultation to take place early in the autumn term 2021. The LA proposal included in the consultation will be for the MFG to be set at +2.0% in 2022/23, as this provides the maximum allowable protection for Lancashire schools and academies and matches the funding floor protection included in the NFF.

Provisional Allocations for 2022/23 Lancashire Position

Information on the provisional DSG allocations for 2022/23 were shared with members and it was noted that initial Schools Block modelling suggests that there may be limited or no headroom available in 2022/23. The main factor creating possible Schools Block pressures from April 2022 relates to the increasing level of deprivation experienced in the county, in part due to the impact of the pandemic.

The increased level of deprivation will be reflected in future DSG allocations under the lagged funding system, but combined with a falling Growth allocation, it is anticipated that there will be no headroom available in 2022/23. In the last 2 financial years, circa £2m of headroom per annum has been targeted at EYB.

The Working Group:

- a) *Noted the report and that final DSG allocations for 2022/23 would be notified in December 2021.*
- b) *Noted that consultation responses on the level of MFG would be presented to the Forum meeting on 19 October 2021 and that the Forum would be asked to formally consider the 2022/23 rate.*
- c) *Supported the proposed voting arrangements as set out for consideration of the de-delegation proposals.*

Subsequent to the meeting, copies of the 2022/23 service de-delegations and schools block funding formula full consultation document and the summary document were circulated to members and copies were provided with the Forum papers.

Analysis and comments from the consultation responses were presented to the Forum meeting on 19 October 2021 and members considered the responses in relation to the MFG proposals.

The Forum:

- a) **Noted the report and the MFG consultation analysis and comments;**
- b) **Unanimously recommended that the level of MFG to be used in the Lancashire funding formula for 2022/23 be set at +2.0%.**

iv. DfE consultation: Fair school funding for all: completing our reforms to the National Funding Formula

The DfE had issued a consultation 'Fair school funding for all: completing our reforms to the National Funding Formula'. A report was presented offering information about the DfE consultation and providing a draft Forum response for consideration.

It was noted that due to the closing date for consultation responses being 30 September 2021, formal approval of a Forum submission will be sought using the Urgent Business Procedure.

The Working Group:

- a) *Noted the report.*
- b) *Noted that formal approval of a Forum submission will be sought using the Urgent Business Procedure.*

Subsequent to the meeting the Forum urgent business procedure was used to seek final comments and approval for the Forum response. Analysis and comments from the urgent business responses were provided.

Responses or comments were received from 24 members.

Of the responses, 20 completed the eform radio button to the question 'Do you support the submission of the draft Forum consultation response?' Analysis of those responses are provided below:

Response	No	%
<i>yes, but with my suggested amendments (please tell us your comments in the next question)</i>	2	10
<i>yes, without amendment</i>	18	90
No	0	0
Total	20	100

Some members also included comments in their responses via the eform or submitted email replies.

The loss of local flexibility, for example on possible block transfers, was highlighted as a particular concern in multiple responses. Concern about the funding pressures in mainstream and high needs was emphasised in one response, as was the need to collect PFI data from all relevant schools to ensure correct funding.

One response disagreed with the proposed legacy grant response.

3 responses also referred to the possible advantages of aligning the school financial year with the academic year, with one comment setting out benefits a school had found when changing to the academic year funding model on transfer to academy status and another citing that the disruption from any transfer of funding year would be short term. Whilst the majority of respondents continued to support the retention of the current April to March financial year, the Chair agreed it was appropriate to recognise these views and the Forum response to question 13. 'How strongly do you feel that we should further investigate the possibility of moving maintained schools to being funded on an academic year basis?' was amended from 'Disagree' to 'Neither Agree nor Disagree'. Additional comment was also included in the text submission question 14 to acknowledge that range of views expressed in the urgent business process.

A copy of the Forum's final consultation submission was provided.

The Forum

- a) **Noted the report and analysis of the urgent business responses from members;**
- b) **Note the final Forum consultation response submitted after the approval using the Forum Urgent Business Procedure.**

v. Recovery Premium

On 6 September 2021, the Government made further announcements about one-off recovery premium as part of its package of funding to support education recovery. This report provided information.

It was noted that the recovery premium provides additional funding for state-funded schools in the 2021 to 2022 academic year. Building on the pupil premium, this funding will help schools to deliver evidence-based approaches for supporting disadvantaged pupils.

All schools that are eligible for pupil premium are eligible for recovery premium and the recovery premium will be allocated using the same data as the pupil premium.

Mainstream schools will get:

- £145 for each eligible pupil in mainstream education
- £290 for each eligible pupil in a special unit

The recovery premium will be paid in 4 payments to schools during the 2021 to 2022 academic year.

Information in the report also contained guidance on

- Using recovery premium funding
- Reporting and accountability

The Working Group

a) Noted the report about the Recovery premium funding.

At the Forum meeting it was noted that DfE had recently issued a template for reporting on PPG and RP. There was some discussion amongst members about whether the use of the DfE was compulsory and officers agreed to check with the DfE.

The Forum noted the report.

vi. School Cost Pressures

Queries had been raised with officers ahead of the meeting about cost pressures facing schools. Information on the issues raised was provided

- NI increase – there is no indication there will be extra funding from DfE to cover this pressure, so at this stage the costs will need to be met from individual school budgets.
- Energy Costs - increased energy costs have been queried with LCC Energy Team. It was reported that no Lancashire schools specific analysis was yet available but the most recent update from the LCC framework provider forecast an increase of 20% on delivered electricity price and 40% on delivered gas price.

The Working Group

a) Noted the report.

The Forum noted the information

10. RECOMMENDATIONS FROM THE HIGH NEEDS BLOCK WORKING

A report was presented setting out the recommendations from the High Needs Block Working Group meeting held on 28 September 2021.

i. High Needs Block 2021/22 – Budget Monitoring

Summer term 2021/22 data had been utilised to provide monitoring and analysis for members. It was noted that the HNB budget is currently forecasting a circa £11m underspend at 31 March 2022.

However, it was emphasised that the yearend monitoring was an estimate of the full year forecast, based on expenditure that occurred in the summer term 2021. There remains significant ongoing financial pressure facing this block despite the current monitoring position,

as the demand and costs continue to rise. It is anticipated that the final outturn position will come in higher than the current forecast.

Members considered the information and also discussed the Lancashire position against other LAs nationally. It was noted that some LAs had overspend high needs funding across recent years and accumulated deficits on the Dedicated Schools Grant (DSG). DfE were working with the LAs with the most significant issues to agree recovery plans with them.

The Working Group

a) Noted the report.

The Forum noted the report.

ii. High Needs Block Funding 2022/23

DfE announcements have been made about the 2022/23 HNB funding arrangements. This report provided further details.

Of the 2022/23 increase of £2.3b, £780m is targeted at High Needs Block. DfE indicate that this represents a 9.6% increase for HNB nationally in 2022/23 and say that the extra resource will continue to help local authorities manage their cost pressures in this area, while the government remains focused on completing the cross-departmental review of the SEND system to ensure that it supports children and young people with SEND is as efficiently and effectively as possible.

High Needs Block National Funding Formula (NFF) for 2022/23

DfE announcements confirm that the basic structure of the high needs National Funding Formula (NFF) for 2022/23 is not changing. An extract from DfE documentation showing the national high needs NFF was provided for members.

Information on the key decisions taken by DfE for 2022/23 are set out below.

The high needs National Funding Formula (NFF) floor and gains cap have been set as follows for 2022/23:

- the funding floor is set at 8% so each local authority will see an increase of at least 8% per head of their 2 to 18 population (as estimated by the Office of National Statistics)
- the gains cap is set at 11%, allowing local authorities to see gains up to this percentage increase under the formula, again calculated on a per head basis of their 2 to 18 population

The hospital education factor will also be uplifted by 8%.

Following the responses to the DfE's high needs formula consultation earlier in the year, DfE have also confirmed that they have made technical changes to the historic spend factor within the high needs national funding formula. Due to the Covid-19 pandemic, some changes to individual proxy factors have also been made for 2022/23, as there is no appropriate 2020 attainment data to use for the two low attainment factors.

Lancashire Position

The July 2021 government announcements also contain provisional 2022/23 allocations for all DSG funding blocks, except early years.

The current Lancashire forecast shows an total increase of circa 10% in the HNB Block from April 2022.

There remains considerable cost and growth pressures in the block, but initial estimates forecast that additional funding should meet increases in demand growth and facilitate a balanced High Needs budget.

Currently there is no indication of any increase in future funding for high needs after 2022/23, but demand growth over the last few years has been circa £10million per year. Therefore, if this level of growth continues without additional funding there is the risk that the high needs budget could cumulatively overspend by circa £10million per annum.

The Group discussed the ongoing cost and demand led pressures across all DSG blocks and noted that DfE were involved in national discussions with the Treasury ahead of the upcoming spending review.

Members emphasised the need for increased allocations for Lancashire going forward to meet the forecast pressures that would be faced, and it was noted that the Forum should have an opportunity to feed into national considerations in the forthcoming DfE consultations that were expected.

The Working Group:

a) Noted the report.

The Forum noted the report.

iii. HNB Indicative Commissioned Place Numbers 2022/23

This report provided an update on the 2022/23 HNB commissioned places process. Following representation from some PRUs, a report was presented to the last working group about the early notification element of the commissioned place process for 2022/23.

The Working Group supported some changes to the system for PRUs but agreed to leave the special schools process unaltered, as set out below:

In July 2021, following ratification of the working group's recommendations by full Forum, correspondence was issued to special schools with the indicative place figures for 2022/23 to provide an opportunity for individual schools to have discussions and make any representations with the relevant services.

A copy of the indicative commissioned place number for each special school for 2022/23, based purely on the calculation methodology, was provided for the working group. A total of 3,188 places are included in the indicative commissioning process at July 2021. This figure is a total increase of 78 compared to July 2020.

Letters were also issued to all PRUs to confirm the change in process.

A number of special schools have contacted the LA about possible changes to the indicative numbers of commissioned places and, any revisions agreed with the Inclusion Service will be built into school budgets for 2022/23.

In response to questions, it was confirmed that there were regular meetings between Inclusion Service and School Finance Heads of Service where the commissioned places would be considered, and feedback provided to the schools that had submitted requests.

There was also some general discussion about the commissioning process and the strategies being deployed to develop more maintained provision in the county and reduce expenditure on 'out-county' placements., although it was noted that some factors were outside the control of the LA, for example parental preferences and appeals and tribunal outcomes.

In connection with the Alternative Commissioning places, it was noted that discussions were continuing with PRUs and it was anticipated that indicative places numbers for PRUs would be agreed with the service shortly.

Members highlighted that the Alternative Provision Strategy Group considerations would impact on the future funding and commissioning arrangements and requested an update on the work of the group.

The Working Group

- a) *Noted the report and that further information would be provided as the commissioned place process continued.*
- b) *Requested an update on the work of the Alternative Provision Strategy Group.*

At the Forum meeting, it was confirmed that discussions are continuing with relevant services in order to finalise the commissioned place numbers for 2022/23 for special schools and PRUs. The DfE's annual HNB place change process (for ESFA funded places and any changes to hospital education funding) had also been issued, with a closing date of 12 November 2021. Further updates will be presented to the next HNB Working Group.

The Forum noted the report.

iv. Lancashire Hospital Education Service: Annual Report: Academic Year 2020-21

The Lancashire Hospital Education Service (LHES) is a centrally managed service that is funded from the DSG High Need Block. Information was provided about the service in 2020/21.

The Lancashire Hospital Education Service (LHES) is a centrally managed service that is funded from the DSG High Need Block. In FY 2020/21 the service was allocated £858k.

The aim of the service is to provide access to high quality education that is appropriate to the child's needs and to support them to return to school or college as soon as they are well enough to do so.

The service is delivered in a number of settings:

- ELCAS: located on Burnley Hospital site:
- The Cove: located in Heysham.
- Hospital Classrooms at Royal Preston and Lancaster General Hospitals
- Home Teaching.

Each setting completes an annual report and a summary is produced by Audrey Swann, Head of Virtual School for CLA and previously CLA and Hospital Education Service. A copy of the summary was provided for members.

The documentation provided some highlights from each setting in 2021/22 and an update on 2021/22 Priorities. The budget information noted an underspend, which was largely attributable to unfilled vacancies.

Comment from the Head of the Virtual School highlighted that the service did a great job during the pandemic and carried on delivering education throughout the period, albeit in a creative way at times!

The Working Group:

- a) *Noted the report.*

The Forum noted the report.

v. Recovery Premium

On 6 September 2021, the Government made further announcements about one-off recovery premium as part of its package of funding to support education recovery. This report provided information.

The Working Group

- a) *Noted the report about the Recovery premium funding.*

The Forum noted the report.

vi. School Cost Pressures

Queries had been raised with officers ahead of the meeting about cost pressures facing schools. Information on the issues raised was provided

The Working Group

- a) *Noted the report.*

The Forum noted the report.

11. 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 5 October 2021.

i. Schools Forum Early Years Block Membership

An update was provided on membership changes

The Working Group:

- a) *Welcomed Sharon Fenton as one of the formal Schools Forum representatives from September 2021.*
- b) *Thanked Sharon Alexander for her contribution to the work of the Forum*

The Forum noted the report.

ii. Early Years Block Funding 2022/23

This report provided an update on EYB funding for 2022/23 and highlighted the possibility that a schools block transfer may be unavailable from April 2022.

On 19 July 2021, the DfE made announcements about the 2022/23 school funding arrangements for Schools, High Needs and the Central School Services Block. As per established practice, no information was included on the Early Years Block allocation from April 2022.

However, initial indications and modelling suggest that schools block headroom in 2022/23 may be limited or not available at all, although final DSG allocations for 2022/23 will not be notified until December 2021. The Schools Block transfer has been used to support a £0.08 per hour uplift in the base rate for 3&4 year olds in 2020/21 and 2021/22 but this may no longer be available from April 2022.

One option available may be to use some DSG reserve in 2022/23 to provide a level of protection in the transition to a 3&4 year old base rate that is no longer supported by a Schools Block transfer.

Members noted that the 2020/21 outturn report for the early years block showed an underspend of circa £1.5m, but that final calculation of EYB DSG is redetermined after the end of the financial year and forecasts suggested that the grant received will be reduced by circa £1.5m.

The group acknowledged that a number of uncertainties remained before any final decisions could be taken about the early years block funding for 2022/23, but supported the use of, say £1m of DSG reserve, to support the level of base rate for 3&4 year olds from April 2022.

In addition, the authority is considering a consultation with the Early Years providers this autumn seeking views on future principles of funding options, perhaps around the balance of allocations, and this could seek views on the short term use of reserves.

The Working Group:

- a) Noted the report.*
- b) Noted that a possible principles consultation could be undertaken with the sector in the autumn term 2021.*
- c) Supported the use of reserves, to provide a level of protection in the transition to a 3&4 year old base rate that is no longer supported by a Schools Block transfer.*

The Forum noted the report and endorsed the Working Group's recommendations.

iii. Maintained Nursery Schools Consultation Update

An update was provided on the progress on the MNS consultation.

The LCC Cabinet made a decision to consult on the future of maintained nursery schools in Lancashire in January 2020. However, this was put on hold due to the covid-19 pandemic.

The decision to consult on maintained nursery schools remained a priority for the local authority and in May 2021 the consultation recommenced with maintained nursery schools to progress this. The first stage of the consultation took place in the summer term 2021 and the LA analysed responses and information received. A report arising from the analysis was

shared with MNS headteachers and governors, towards the end of term, to help shape discussions about the service and individual schools going forward.

Meetings with individual schools took place at the end of the summer term 2021 and further meetings are continuing in autumn term 2021.

An update report had been produced for the County Council's Education and Children's Services Scrutiny Committee, on 5 October 2021 and a copy of this report was provided for the working group.

It was anticipated that further information on the next steps in the consultation process would become available in the new year.

The Working Group:

- a) *Noted the report.*

The Forum noted the report.

iv. Education Recovery Board

The Chair fed back on some of the early years issues considered at recent Education Recovery Boards.

Matters included:

- covid testing in the sector – it was highlighted that there was uncertainty amongst parents about the arrangements and that a sample letter provided by LCC/Public and Health had been circulated by some settings and had provided assistance.
- SEN issues – comments were made by members and it was noted that further discussion could take place at the Early Years SEN Task and Finish Group meeting scheduled for 11 October.
- Funding for closed bubbles - there was some discussion at the working group about the financial impact on settings that needed to close for a short period due to covid, if parents had to temporarily move their child to access their entitlement. It was noted that parental rights had to be protected, but that in practice few children move settings in these circumstances and no issues had been recorded.

The Working Group:

- a) *Noted the report.*
- b) *Supported the recirculation of the LCC/Public Health letter on testing in the sector bulletin.*

At the Forum meeting, it was reported that the Early Years SEN Task and Finish Group meeting scheduled for 11 October had taken place and it was confirmed that the revised SEN Inclusion Fund arrangements commenced in September, which:

- ***Increased the value of allocations***
- ***Extended the eligibility criteria***
- ***Reduced bureaucracy in the application process***

Initial feedback from the sector was positive with comment made that the process was easier.

The Forum noted the report.

12.RECOMMENDATIONS FROM THE APPRENTICESHIP LEVY STEERING GROUP

A report was presented setting out the recommendations from the Apprenticeship Levy Steering Group meeting held on 5 October 2021.

Colleagues from the Apprenticeship Levy team delivered a presentation to members providing an update on the latest school related developments, including:

98 new Requests for Funding had been received and approved since June 2021, with a total value for this window of opportunity of circa. £718k over the duration of the apprenticeships. There are currently 271 on-going apprentices, 40 awaiting enrolment, and 239 have completed since April 2017. Currently, there are 7 live apprenticeship vacancies. 29 Schools have taken advantage of the new employment incentives with 38 potential new apprentices having been recruited who are eligible since April 2021.

Upskilling requests are up in 2021 with 141 requests registered compared to 58 in the previous 12 months .

The Pooled payroll issue is still unresolved . Apprenticeship levy team colleagues had recently attended a LGA round table meeting with the ESFA to discuss possible solutions but there was no immediate prospect of a solution being found and work was continuing on this.

Following a large procurement exercise over the summer, the stand still period had now finished, and contracts are being awarded to providers,

An update on the latest financial position was shared with the group, and it was noted that the Total spend to date was £1,873,867

Information was shared about the county council had the following levels against the target:

- 0.70% - 2017-2018
- 1.36% - 2018-2019
- 1.37% - 2019-2020
- 0.81% - 2020-2021

It was noted that schools account for 58% of total number of employees as of 31st March 2021.

The Annual Levy Transfer pot was circa. £242,000 and 19 transfer requests, across 12 schools and early years settings, were going ahead, with 5 still awaiting enrolment in the first window.

The apprenticeship levy team intend to resume marketing activity and information sessions to schools. They will also continue to contact schools directly to promote apprenticeships and to focus on the need to upskill and as well as recruit

It was noted that it was National Apprenticeship Week 7th – 13th February 2022 and Case studies were needed !

The Working Group:

- a) *Noted the information;*
- b) *Expressed frustration at the continued difficulties caused by school pooled payroll issues;*
- c) *Requested that schools and early years providers be encouraged to engage with the apprenticeship levy, via the schools portal and early years bulletins;*
- d) *Requested that a more detailed breakdown of early years take-up be provided directly to the Forum early years representatives;*
- e) *Thanked the Apprenticeship Levy Team for their continued hard work and dedication during difficult circumstances.*

The Forum:

- a) Noted the report;**
- b) Endorsed the Steering Group's recommendations;**
- c) Expressed frustration at the continued difficulties caused by school pooled payroll issues.**

13. URGENT BUSINESS

It was noted that information on the decision taken using the Forum's urgent business procedure was included in the Schools Block report

14. ORACLE FUSION PRESENTATION

Jon Howard and Martin Clarkson from Payroll Services attended the meeting to present this item.

An update presentation was provided for the Forum about the Oracle Fusion project.

It was noted that over the last few months, the county council has been reviewing the Oracle Fusion implementation plan to ensure some critical business functions can be accommodated. This has resulted in a delay to the overall delivery of Fusion and the revised target implementation date for HR & Payroll is now early July 2022.

Significant support and training will be provided to schools ahead of the implementation, including

- Instructor Led Events
- Demonstrations & Drop-ins
- Quick Reference Guides
- How-to Videos
- Oracle Guided Learning (step by step live learning tool in Fusion)

Feedback from user workshops for Schools & Academies Business Managers, Bursars and Administrators, was provided for the group and it was note that responses had been positive, with comments including:

- The new processes will be easier to complete and will save time
- Information will be in part auto-populated and there'll be no duplication
- There's a good historical overview and progress of queries through AskHR via HelpDesk

As part of the work to ensure a successful implementation of Oracle Fusion the county council will be running several surveys throughout the year. These surveys will help assess how well

we are prepared for the introduction of the new system. First survey opens 3 November 2021 and a notice will be issued on the Schools Portal.

The Forum noted the information provided.

15. FORUM CORRESPONDENCE

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

16. ANY OTHER BUSINESS

There were no AOB items.

17. DATE OF FUTURE MEETINGS

It was noted that the next scheduled Forum meeting will be held at 10.00 am on Thursday 13 January 2022. 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.