

LANCASHIRE SCHOOLS FORUM

The meeting to be held at 10.00 am on Tuesday 18 October 2022 in the Savoy Suite,
The Exchange, County Hall

A G E N D A

1. Attendance and Apologies for Absence

To be recorded in accordance with the agreed membership of the Forum.

2. Substitute Members

To welcome any substitute Members.

3. Forum Membership (Enclosure)

To note the Forum membership report.

4. Minutes of the Last Meeting (Enclosure)

To agree on the minutes of the last meeting held on 5 July 2022.

5. Matters Arising

To consider any matters arising from the minutes of the meeting held on 5 July 2022 that are not covered elsewhere on the agenda.

6. Education Management System (Impulse) Update

Emma Lambert Education Management System Project Service Lead will attend the Forum for this item.

To receive a presentation about the procurement of new education management system and the project aims and vision

7. School Improvement Function

Tim Roger will be attending to follow up on any questions regarding Service Improvement Function and explain the value of this service.

8. Inclusion Report

Sally Richardson will be attending to follow up on any questions regarding Inclusion Report in the de-delegation.

9. Energy Cost Update (Attached)

A letter was published on 6th September 2022 on 'October 2022 annual energy price increase' (Attached)

10. Recommendations from the Schools Block Working Group (Enclosure)

To consider the recommendations from the Schools Block Working Group from 20 September 2022, including

- the vote on de-delegation and Minimum Funding Guarantee (MFG) proposals for 2023/24.

To consider forum correspondence.

11. Recommendations from the High Needs Block Working Group (Enclosure)

To consider the recommendations from the High Needs Block Working Group from 27 September 2022.

12. Recommendations from the Early Years Block Working Group (Enclosure)

To consider the recommendations from the Early Years Block Working Group from 4 October 2022.

13. Forum Correspondence

There was one Forum related correspondence to consider at this meeting.

14. Any Other Business

15. Date of Future Meetings (Enclosure)

To note that the next scheduled Forum meeting will be held at 10.00 am on Thursday 12 January 2023. Arrangements for the meeting will be confirmed in due course.

A copy of the forum schedule of meetings for the 2022/23 academic year is provided. The schedule includes a physical venue for each meeting but they may be conducted virtually.

Lancashire Schools Forum meeting of 18 October 2022

Executive Summary

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 on the minutes of the last meeting held on 5 July 2022 and any matters arising.

6. Education Management System (Impulse) Update

Emma Lambert Education Management System Project Service Lead will attend the Forum for this item.

To receive a presentation about the procurement of new education management system and the project aims and vision

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Tim Roger will be attending to follow up on any questions regarding Service Improvement Function and explain the value of this service.

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9. Energy Cost Update

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10. Recommendations from the Schools Block Working Group

To consider the recommendations from the Schools Block Working Group held on 20 September 2022.

i. Schools Block Funding Arrangements 2023/24

On 19 July 2022, the DfE made announcements about the 2023/24 school funding arrangements. This report provided relevant information, including proposals for a 2023/24 MFG level of +0.5%, which are the subject of consultation with schools and academies.

The Working Group:

- a) Noted the report and that final DSG allocations for 2023/24 would be notified in December 2022.*
- b) Noted that consultation responses on the level of MFG would be presented to the Forum meeting on 18 October 2022 and that the Forum would be asked to formally consider the 2023/24 rate.*
- c) Supported the proposed voting arrangements as set out for consideration of the de-delegation proposals.*

- d) Supported the proposal to retain the current notional SEN calculation for the 2023/24 financial year.
- e) Supported the disapplication to the DfE to request the continued use of an Exceptional Factor in the Lancashire formula, to provide allocations to 3 schools to cover the costs of renting premises for the schools.

Analysis and comments from the MFG consultation responses will be presented to the Forum meeting on 18 October 2022 and members will be asked to consider the 2023/24 MFG proposals.

ii. Inclusion Hub Report

A copy of the report was circulated to members after the meeting.

The Working Group:

- a) *Noted the report would be circulated to members after the meeting.*

iii. Service De-delegations 2023/24

Information was provided about 2023/24 de-delegation proposals and the consultation with schools

The Working Group is asked to:

- b) *Noted the report;*
- c) *Noted that de-delegation papers would be circulated to members after the meeting;*
- d) *Noted that consultation responses would be presented to the Forum meeting on 18 October 2022 and that the Forum would be asked to formally consider de-delegation decisions for 2023/24.*
- e) *Supported the proposed de-delegation voting arrangements.*

Analysis and comments from the de-delegation consultation responses will be presented to the Forum meeting on 18 October 2022 and members will be asked to consider the 2023/24 de-delegation proposals.

iv. Clawback Exemption Request

In July 2022, the Forum considered the School Balances and Clawback Policy for 2022/23 and agreed that clawback should be reintroduced on excessive revenue balances at March 2023.

Following notification of the Forum's decision, requests have been received from 2 Lancashire secondary schools requesting an exception to the policy at March 2023.

The Working Group

- a) *Noted the report about clawback.*
- b) *Supported two clawback exemptions for 2022/23 to be taken as a recommendation to the School Forum meeting*

It was reported that no Lancashire schools specific analyses were yet available. The Energy Team was invited to attend the School Forum meeting on 18 October 2022, to provide further information.

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

11. Recommendations from the High Needs Block Working Group

To consider the recommendations from the High Needs Block Working Group meeting held on 27 September 2022.

i. High Needs Block 2022/23 – Budget Monitoring

Summer term 2022/23 data had been utilised to provide High Needs Block monitoring and analysis for members

The Working Group

- a) Noted the report.*

ii. High Needs Block Funding 2023/24

DfE announcements have been made about the 2023/24 HNB funding arrangements. This report provided further details.

The Working Group:

- a) Noted the report.*

iii. HNB Indicative Commissioned Place Numbers 2023/24

This report provided an update on the 2023/24 HNB commissioned places process.

The Working Group

- a) Noted the report, accepted the number of commissioned places and that further work was taking place on the alternative provision strategy that could affect places.*
- b) Supported changes to modelling for 2023/24.*

iv. MASH Education Annual Report

The Forum will be aware that the funding for the Multi-Agency safeguarding Hub (MASH) was transferred to the HNB in 2022/23, as the DfE were reducing the historic commitments costs included in the Central school Services Block (CSSB). For 2022/23, £150k was included in the HNB budget, and a similar allocation will be included in initial budget proposals for 2023/24.

Working group members stated the service is invaluable and provides excellent reassurance for schools.

The Working Group:

- a) Noted the report.*

v. Lancashire Hospital Education Service: Annual Report: Academic Year 2021-22

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 2021/22.

The Working Group:

- b) Noted the report.*

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

12. Recommendations from the Early Years Block Working Group

To consider the recommendations from the Early Years Block Working Group meeting held on 4 October 2022.

i. Appointment of Working Group Chair

This was Peter Hindle's final meeting and Philippa Perks has been nominated as his replacement as the Working Group Chair.

Members elected Philippa Perks, as the new working group Chair.

The Working Group:

- a) Thanked Peter for his contribution to the Forum.*
- b) Confirmed that Philippa is elected as the new Early Years Block Working Group Chair.*

ii. Schools Forum Early Years Block Membership

An update was provided on membership changes

The Working Group:

- a) Welcomed Sarah McGladrigan as one of the formal Schools Forum representatives from September 2022.*

iii. Early Years Block Funding 2023/24

This report provided an update on EYB funding for 2023/24 and highlighted the possibility that a schools block transfer may be unavailable from April 2023.

The Working Group:

- a) Noted the report.*

iv. Urgent Business Procedure on DfE Consultation on Early Years National Funding Formulae and Childcare: Regulatory Changes

Two consultations were submitted to DfE.

The Working Group:

- a) Noted the report.*

v. DfE Visit to Lancashire

Andrew Cadman provided a verbal update on the DfE visit.

It was noted that the DfE very rarely meets with EY Sector representatives and LA officers where there is the level of positive relationship that we have in Lancashire. This is a testament to the hard work, commitment and passion that is delivered on a daily basis.

The Working Group:

- a) Acknowledged DfE visit.*

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

13. Forum Correspondence

There was one Forum related correspondence to consider at this meeting.

14. Any Other Business

No known items

15. Date of Future Meetings (Enclosure)

To note that the next scheduled Forum meeting will be held at 10.00 am on Thursday 12 January 2023. Arrangements for the meeting will be confirmed in due course.

A copy of the forum schedule of meetings for the 2022/23 academic year is provided. The meetings include a physical venue but may be conducted virtually.

LANCASHIRE SCHOOLS FORUM

Date of meeting 18 October 2022

Item No 3

Title: Forum Membership

Executive Summary

This report summarises the changes to the Forum membership since the last meeting.

Forum Decision Required

The Forum is asked to:

- a) Note the report,**
- b) Welcome Caroline Clayton, Emma Smurthwaite, Lindy King, Nigel Whittle, Oliver Handley, Margaret Scrivens, Helen Shaw, Abigale Bowe, Heather Lomas, Matt Eastham, Paula Barlow, Sarah McGladrigan, County Councillor Stewart Jones to the Forum.**
- c) Welcome Sam Ud-din and Steve Campbell back to the Forum.**
- d) Thank County Councillor Andrea Kay and Peter Hindle for their contributions to the Forum.**

Background

This report provides information on Forum membership issues that have arisen since the last Forum meeting. Details are provided below.

Annual Membership Review

As part of the annual membership review process, several members left the Forum at the end of the 2021/22 academic year, with the thanks of their colleagues, and several new appointments have been made from September 2022.

The Forum will wish to welcome the following new members to their first meeting:

Primary School Governors

- Caroline Clayton, Great Eccleston Copp School
- Emma Smurthwaite, Crawshawbooth Primary School
- Lindy King, Goosnargh Oliverson's C E
- Nigel Whittle, Pilling St. John's Church of England Primary School

Primary School Headteachers

- Helen Shaw, Higham St. John's C E Primary School

Secondary School Headteacher

- Oliver Handley, Pendle Vale High

Schools Block Observer

- Margaret Scrivens, LASGB

Pupil Referral Unit Representative

- Abigale Bowe, Shaftesbury High School

Higher Needs Block Observer

- Paula Barlow, Acorns

Academy Secondary School Headteacher

- Matt Eastham, Penwortham Priory Academy

Private, Voluntary and Independent (PVI) providers of the free entitlement to early years education

- Sarah McGladrigan, Cliff House Nursery Ltd

Early Years Block Observer

- Heather Lomas, Little Explorers

The Forum will also wish to welcome back the following members returning in positions:

Primary School Governors

- Sam Ud-din, Sandylands Primary School

Academy Secondary School Headteacher

- Steve Campbell, LET Educational Trust CEO

County Councillor Members

The County Council has nominated CC Stewart Jones to replace CC Andrea Kay on the Schools Forum.

The forum will wish to thank CC Andrea Kay for her contribution to the Forum and welcome CC Stewart Jones as her replacement.

The forum also wishes to thank Peter Hindle for his contribution to the forum and welcome Sarah McGladriggan, as his replacement.

**MINUTES OF THE MEETING HELD AT 10:00 A.M. ON TUESDAY 5TH JULY 2022
At County Hall and via Microsoft Teams)**

Present:

Schools Members:

Primary School Governors

Stephen Booth
Gerard Collins
Laurence Upton
Tim Young

Academy Governor

Chris McConnachie
Helen Dicker
Louise Shaw

Primary School Headteachers

Daniel Ballard
Deanne Marsh
Keith Wright

Academy Principal/Headteacher

James Keulemans
John Tarbox

Alternative Provision Academy

Secondary School Governors

John Davey
Gill Donohoe
Brian Rollo

Special School Academy

Louise Parrish

Special School Governor

Mandy Howarth

Secondary School Headteachers

Steve Campbell
Mike Wright

Special School Headteacher

Shaun Jukes – Forum Chair

Nursery School Headteacher

Jan Holmes

Short Stay Governor

Liz Lavery

Nursery School Governor

Thelma Cullen

Short Stay Headteacher

Abigale Bowe

Members:

Early Years - PVI

Peter Hindle
Sharon Fenton
Philippa Perks

Other Voting Members

Rosie Fearn
CC Sue Hind

Observers

Christopher Anderson (NEU)
CC Michael Goulthorp
CC Anne Cheetham
Jonathon Georgy
Stewart Jones
Sam Ud-din (LASGB)
Ian Watkinson (NEU)

In attendance: Paul Bonser
Julie Bell
Millie Dixon
Kevin Smith
Luke Rutter

1. APOLOGIES FOR ABSENCE

Apologies were received from Janice Astley, Sarah Barton, Jenny Birkin, Matt Dexter, Matt Eastham, Steve Jones, CC Andrea Kay, Jackie Lord, Bill Mann, Michelle O'Neil, Alan Porteous, CC Jayne Rear, Sarah Robson, Claire Thompson, Sarah Troughton and Robert Waring.

2. SUBSTITUTE MEMBERS

Substitute members were welcomed to the meeting:

- CC Michael Goulthorp attended for CC Jayne Rear
- Ian Watkinson and Chris Anderson attended for Sarah Troughton

3. FORUM MEMBERSHIP AND ELECTION OF CHAIR FOR 2022/

This report provided information on membership changes since the last meeting:

Members leaving as part of the annual membership review included:

Cathryn Antwis	Primary School Headteacher
Steve Campbell	Secondary School Headteacher
Nicola Regan	Secondary School Headteacher
Gaynor Gorman	Academy Headteacher
Alan Porteous	Academy Headteacher
Shaun Jukes	Special School Headteacher
Jane Eccleston	PRU Headteacher
James Johnstone	Primary School Governor
Karen Stracey	Primary School Governor
Laurence Upton	Primary School Governor
Sam Ud-din	LASGB Observer

In addition, officers leaving the Forum included@

- Delyth Mathieson, Head of Service Education Improvement
- Paul Bonser, Clerk to Forum

The LA is making arrangements to seek replacement representatives for September 2022 and members are asked to note that

- Steve Campbell will be returning as an academy Headteacher representative;
- Sam Ud-din will be returning as a primary school governor representative.

Steve Campbell had indicated that he was happy to continue as chair of the schools block in 2022/23, if there are no objections/other nominations.

Members also welcomed:

- Abigale Bowe to her first Forum meeting as the formal PRU representative;
- Sylwia Krajewska to her first Forum meeting (new forum clerk, attending today as an observer).

Any members wishing to volunteer for the Education Digital Services Schools Focus Group were asked to inform the Clerk

Forum Chair

As previously noted, Shaun Jukes is one of the members leaving the Forum at the end of the academic year and members were asked to consider a new Forum Chair for 2022/23.

One nomination had been received from Daniel Ballard, Primary school Headteacher representative.

The Forum:

- a) Noted the report;**
- b) Expressed thanks to those members and officers leaving the Forum, especially the Forum Chair;**
- c) Welcomed new members and officers to the Forum;**
- d) Appointed Daniel Ballard as the Forum Chair for 2022/23, unopposed;**
- e) Supported Steve Campbell continuing as Schools Block Chair from September 2022, unopposed;**
- f) Individual members not already on the Education Digital Services Schools Focus Group are asked to consider volunteering.**

4. MINUTES OF THE LAST MEETING

The minutes of the last meeting held on 17 March 2022 were agreed as a correct record.

5. MATTERS ARISING

From item 4 Matters Arising - Indexation of teachers pensions.

The LA had hoped to be able to present a more formal report on this issue to the July Forum meeting, but unfortunately, the outcome of the Teachers Pensions Scheme Advisory Board meeting in May 2022 is still awaited.

Schools HR understand from Teachers Pensions Agency that a retrospective salary increase can be applied at any time and that there is no one year limit for it. Lancashire HR advice is going to be about taking no action in respect of all teachers (with regard to the £1 token increase), but if, when a teacher submits their intention to retire to the school, it is apparent that they have been impacted by the lack of indexation (because they would be relying on

this year as one of their best in three), a school can then apply a £1 increase backdated to this year. This all has to take place before the teacher submits their pension forms though.

A further clarification was confirmed that Payroll are not taking any automatic action, as they would be guided by information issued by Schools HR/Schools.

Communications will be issued to schools once the national guidance has been published.

The Forum:

- a) Noted the information.**

6. LANCASHIRE COUNTY COUNCIL'S EDUCATION STRATEGY 2022-2025 AND TEAM AROUND THE SCHOOL AND SETTINGS (TASS)

Julie Bell, Director of Education, Culture and Skills will attend the meeting to present an update on this item

The Education Strategy for 2022-2025 sets out the county council's ambition for all children and young people in Lancashire, regardless of their starting point in life, to have access to quality learning that will enable them to thrive and develop the life skills to support them into a productive and happy adulthood.

A copy of the Strategy was provided for the Forum. The document:

- Contains a foreword by CC Jayne Rear, Cabinet Member for Education and Skills Lancashire County Council;
- Outlines five priorities for the county;
- Is underpinned by 'seven pillars' to clearly demonstrate shared responsibilities across partner agencies that will help drive the joined-up approach to education in Lancashire.

Key to the strategy is Team Around the School and Settings (TASS), which is an approach that involves local partners, networks and children specialist professionals to help identify patterns, address strategic issues, help make improvements and ultimately achieve the very best outcomes for all children and young people in Lancashire.

As previously requested by the Forum, further information on Team Around the Schools and Settings is available [here](#).

As the meeting, Julie provided an update on the latest developments and answered queries about the strategy from Forum members.

The Forum:

- a) Noted the report;**
- b) Thanked Julie for her presentation on the Education Strategy 2022-2025 and Team Around the School and Settings.**

7. RECOMMENDATIONS FROM THE SCHOOLS BLOCK WORKING GROUP

A report was presented setting out the recommendations from the Schools Block Working Group held on 21 June 2022.

i.2021/22 Schools Budget Outturn Report

This report provided the Working Groups with details of the 2021/22 Schools Budget final financial outturn position, in relation to each funding block. A copy of the full report presented to the working group was provided for members.

The Overall Schools Budget outturn position for 2021/22 showed an underspend of circa £8.4m.

Further details were provided in connection with each funding block and members concentrated on the Schools Block and Central School Services Block positions. It was noted that the outturn position for the 2021/22 Schools Block revealed a circa £0.4m underspend. Some key issues were highlighted.

The Working Group

- a) *Noted the report and the 2021/22 Schools Budget final financial outturn position.*

The Forum noted the report.

ii.School Balances and Clawback 2021/22

This report set out the year end position of schools' delegated budgets at 31 March 2022. A copy of the full report presented to the working group was provided for members.

The final outturn position against schools delegated budgets at 31 March 2022 was an underspend of £5.173m. This meant that school balances had increased by £5.173m in 2021/22, to a total of £95.325m.

Further details were provided, and members concentrated on the Schools Block schools. It was noted that, in total 21 schools were in deficit at March 2022, the lowest number since March 2015.

It was also noted that the year end position did include grant funding from DfE that was allocated on an academic year basis and analysis provided by schools about their year end position at 31 March 2022 indicated that circa £28m of total balances are classed as 'committed'.

School Balances and Clawback Policy 2022/23

Whilst clawback has been suspended on year end balances at March 2020, 2021 and 2022, the guideline balance policy remained unchanged, as follows:

- 12% of Consistent Financial Reporting (CFR) income for all phases of maintained school
- A £60,000 minimum balance threshold will be applied.

The group were asked to consider the school balances and clawback policy to be applied at 31 March 2023. A number of schools balances and clawback options were available, and the group considered the possibilities. Individual members spoke both for and against the reintroduction of clawback, and highlighted various issues, including the reduced impact of Covid on school funding, but the increased inflationary costs pressures facing the sector. In addition, the number of schools with 12% balances or over was emphasised, although it was noted that this did not take account of DfE grants allocated on an academic year basis, which would be excluded from clawback, the level of committed balances in year end reserves, or

the fact that schools would take different spending decision if a clawback mechanism was in place.

Clawback Exemption Request 2022/23

Members also considered an exemption from clawback for a Lancashire secondary school that has been saving funding towards a sports hall.

Schools Budget Reserves 2021/22

The 31 March 2022 position on Schools Budget Reserves was also considered, and it was noted that the total of all schools reserves was £126.872m, an increase of circa £16m.

Members considered questions posed around the School Teaching and Support Staff Supply Reimbursement Scheme reserve, which ended the year with an underspend of circa £0.4m, leaving an outturn position of circa £2.3m. The overall in year position includes a surplus on the teacher scheme of just under £0.6m, which was offset by a circa £0.2m deficit on the support staff scheme.

The Forum had previously agreed that any year end balance above £1.25m should be redistributed to scheme members. The working group considered if £1.25m remained an appropriate maximum level for the reserve or if it should increase to say £1.5m.

Members discussed key issues highlighted in the report and made a number of recommendations.

The Working Group:

- a) *Noted the report;*
- b) *Noted the overall position on school balances at 31 March 2022, including the individual school level information provided in the report;*
- c) *On balance, recommended that clawback of revenue balances above the guideline figure should be reinstated at 31 March 2023, at previous 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);*

(Note: As clawback was suspended in 2021/22, no school would be subject to the 100% clawback rate in 2022/23).
- d) *Recommended that the minimum balance threshold of £60,000 be increased, to offer greater protection for small schools, to £70,000 or £75,000;*
- e) *Recommended that the reintroduction of clawback be kept under review to assess the impact on Lancashire schools;*
- f) *Supported a clawback exemption applying to a Lancashire secondary school saving towards a sports hall project;*
- g) *Noted the underspend on the supply scheme budget at 31 March 2022 and recommended that the level of scheme reserve be increased to £1.5m and any funding in excess of this at March 2022 be reimbursed to scheme members, on the basis of contribution levels to the teaching staff scheme only.*

In connection with recommendation d) above, officers are recommending that the minimum balance threshold be increased to £75,000 for 2022/23, which will rebase the value to a level broadly equivalent to that when the threshold was last increased.

It was noted that recommendations from HNB and EYB were similar.

The Forum,

- a) Ratified the working groups' recommendations;**
- b) Supported the minimum balance threshold be increased to £75,000 for 2022/23.**

iii. Schools Forum Annual Report 2021/22

Each year the Schools Forum publishes an annual report setting out items of business in which the Forum has been involved

A draft report for 2021/2022 was presented for consideration, and the HNB issues were highlighted.

The Working Group:

- a) Noted the report;*
- b) Recommend to the Schools Forum that the 2021/22 Annual Report be approved for publication.*

A copy of the final version of the 2021/22 Annual Report was provided for members

It was noted that the HNB and EYB also supported the publication of the report,

The Forum,

- a) Ratified the working groups' recommendations.**

iv. De-Delegation Proposals 2023/24

In accordance with normal practice, it is envisaged that a de-delegation consultation will be issued to maintained primary and secondary schools in early September 2022, with responses being reported to the meeting on 18 October 2022, at which time the Forum will be asked to make formal decisions, by phase, on each de-delegation proposal.

In 2022/23, the Forum formally approved 4 service de-delegations, relating to:

- Staff costs – Public Duties/Suspensions
- Heritage Learning Service - Primary Schools Only
- Support for Schools in Financial Difficulty
- Inclusion Hubs - Primary Schools Only

Relevant de-delegations were also offered to nursery schools, special schools and PRUs as pooled services buy-backs.

For 2023/24, the LA is again proposing to consult on the continuation of these four services as de-delegations, plus possibly a fifth service relating to school improvement activity. Further information was provided on each service.

Further details about the 2023/24 proposals were discussed by the working group, including moving to a fully NOR based charging methodology for the staff costs and schools in financial difficulty de-delegations.

In addition, the possibility of a more uniform approach to the evaluation of the work of the Inclusion Hubs, is being considered, to find ways of measuring inclusion (rather than just exclusions) and trying to create a uniform measure across Districts that are making different offers. The LA is supporting this work.

The possibility of a fifth de-delegation in 2023/24 for School Improvement Functions was also being considered. If the LA decides to proceed with a de-delegation proposal information will be included in the annual consultation with schools to be issued in September 2022 and details of the proposals and the school responses will be reported to the working group and Forum in September and October 2022.

The working group considered the 2023/24 proposals and discussed key issues. Members reiterated some concerns about inconsistency in the inclusion hub offer and the need for the sharing of best practice and the development of key performance indicators to be available to measure the outcomes of hubs across different districts. The involvement of academies in the exclusion process and their ability to join their local hub, at an equivalent rate of £11 per hour was also discussed. Officers indicated that work was being undertaken to support inclusion hub developments along the lines suggested and that the Forum comments would be fed back into the process.

The Working Group:

- a) *Noted the report;*
- b) *Requested that their Inclusion Hub comments be considered by officers/Inclusion Hub Steering Groups:*
- c) *Supported the proposed consultations on other possible de-delegation proposals for 2023/24.*

The Forum ratified the working group's recommendations.

v.Completing the reforms to the National Funding Formula: Government consultation response

In July 2021, the DfE issued a consultation titled Fair school funding for all: completing our reforms to the National Funding Formula. The Forum responded to the consultation.

On 28 March 2022, the DfE published its response to the consultation. The Government say that all the views received have influenced their final decisions and in summary, the DfE will proceed with the proposals.

No firm date is provided for the full implementation of the hard NFF, and as Lancashire has already adopted the NFF as the local funding formula, the 2023/24 requirements for LAs to move factor values closer to the NFF will not have any significant impact on school funding requirements in the county from April 2023.

The DfE indicate that the approach to the transition in subsequent years will depend on the impact in the first transitional year in 2023/24.

The Working Group:

- a) *Noted the report.*

The Forum noted the report.

vi.Schools Bill 2022

Following the State Opening of Parliament on 10 May 2022, the Secretary of State for Education published a New Schools Bill. The Bill is wide ranging and incorporated some elements of the recent 'Opportunity for all' schools white paper. Of relevance to the Schools Forum, the Bill includes proposals to move to a direct National Funding Formula.

Alongside the Bill, the Government have published a number of factsheets, providing further information about their proposals. The National Funding Formula Reforms Schools Bill Factsheet was provided for members. This confirms that if the Bill is enacted, a duty will be placed on the Secretary of State to determine funding for all mainstream schools (both academies and maintained schools) in England through a single, directly applied national funding formula.

The Working Group:

- a) Noted the report.*

The Forum noted the report.

vii.Implementing The Direct National Funding Formula Consultation

On 7 June 2022, the DfE launched a further consultation on 'Implementing the Direct National Funding Formula'. A copy of the DfE consultation document is available [here](#).

The consultation focuses on the detail of the implementation of the direct NFF, including:

- The interaction between the direct NFF and funding for high needs
- Growth and Falling Rolls funding
- Premises funding
- The minimum funding guarantee (MFG) under the direct NFF
- The annual funding cycle

Responses to the consultation must be submitted by 9 September 2022.

An briefing on the consultation was provided for the working group and an initial view for a draft response and it is intended that a draft Schools Forum response will be provided for the Forum meeting on 5 July 2022.

Members considered the information provided and were supportive of the initial views expressed.

The Working Group:

- a) Noted the report;*
- b) Were supportive of the initial views expressed on a possible Schools Forum consultation response.*

Subsequent to the working group meeting, a full Schools Forum consultation response was developed, was provided for members, for comment/approval by the Forum.

The Forum:

- a) Noted the report;**
- b) Ratified the Working Group's recommendations;**
- c) Approved the Schools Forum consultation response for submission.**

viii. Scheme for Financing Schools in Lancashire

In March 2022, the DfE issued a 14th update to Statutory Guidance on schemes, which amended the guidance for the 2022 to 2023 financial year. In addition to some minor edits to wording and the revision of dates, the main change highlighted by the DfE is that in the 'Borrowing by schools' section the reference to the Salix Scheme has been removed, as this scheme has now closed.

The Authority has reviewed the Lancashire scheme and introduced the relevant amendments. A copy of the revised draft Lancashire Scheme, incorporating the proposed DfE amendments was provided.

On 20 April 2022, the county council issued a consultation with maintained schools, seeking views on the proposed scheme changes and provided an eform to facilitate responses.

32 responses were received in the consultation and an analysis is provided below:

Do you support the changes to the Lancashire scheme for financing schools that are being introduced as a result of the updated DfE scheme guidance?		
Yes	27	84%
No	0	0%
Not Sure	5	16%
Total	32	100%

No additional comments were received as part of the consultation process.

The working considered the proposed scheme amendments and the consultation analysis.

The Working Group:

- a) Noted the report.*
- b) Recommended that the Schools Forum approve the proposed scheme changes.*

The Forum:

- a) Noted the report;**
- b) Supported the Working Group's recommendations;**
- c) Maintained school members unanimously approved the revised scheme for publication.**

ix. Schools Supplementary Grant 2022 to 2023

Subsequent to the March 2022 Forum meeting, the DfE have confirmed that local authorities and academies will receive their payments for 2022/23 in two tranches.

Payments will be made in May/June 2022 to cover April 2022 to August 2022, and in October/November 2022 to cover September 2022 to March 2023.

The Forum have agreed that the High Needs Supplementary payments will be made on the same basis as for mainstream schools, so these payments will be actioned in two tranches, as set out above.

Payments for the first tranche of allocations had now been processed and would be on June oracle information. It was noted that for the final calculation of the high Needs supplementary

payments using the May 21 data, the overall rate for the WPN payments has reduced to £625.97 from the initial £630.69 as first forecasted.

The Working Group:

- a) Noted the report.*

The Forum noted the report.

x.Growth Fund Policy Update

Since 2014, the Schools Forum has had in place a Growth Fund Policy to assist schools/academies commission by the LA for basic need growth. The policy ensures that a transparent and formulaic process is used for allocating additional funds that takes account of expanding schools' needs whilst minimising the effect on the Dedicated Schools Grant (DSG).

The policy has been amended from time to time since its introduction, to take account of various developments. The latest substantive amendment of the policy was agreed by the Forum in March 2021, in order to support the establishment and growth of a new school in Lancashire.

As part of the ongoing discussions with schools in the county over basic need places, the School Place Planning Team have raised some concern that the current Growth Fund Policy may benefit from certain clarifications around the issues highlighted above, so that there is clarity on the funding calculation and expectations on schools that are in receipt of growth funding. It is therefore proposed to add the following conditions to the Growth Fund policy, subject to the views of the Forum:

- Where expansion funding has been provided to a school based on a specific Published Admissions Number (PAN), then within the following 7 years for primary schools/academies or 5 years for secondary schools/academies, considerations of extra funding will be considered on the same PAN irrelevant of any decision by the school/academy to reduce their PAN;
- Where a school has reduced their PAN, this may only be considered as the new growth funding baseline after 7 years for primary schools/academies or 5 years for secondary schools/academies post reduction;
- By the school/academy signing the funding agreement they are committing to taking up to that number of pupils across the whole academic year and maintaining that higher admission number for that cohort as it moves through the school.

The Working Group:

- a) Noted the report;*
- b) Supported the proposed update to the Growth Fund Policy.*

The Forum endorsed the Working Group's recommendations.

xi.Split Site Funding Appeal

Following a series of reports, a revised split site policy was agreed by the Forum in January 2019 and subsequent reports have presented appeals and late applications for the consideration of members.

From 2021/22, transitional arrangements should have finished, and schools should have received a split site allocation in accordance with the revised criteria. However, due to an oversight, transitional protection for split site allocations remained in the formula for 2021/22.

This issue was identified as part of the budget preparations for 2022/23 and school budgets were issued with split site allocations calculated purely on the revised criteria.

On receipt of their 2022/23 budget, it then became apparent to one school that the split site funding had been lost and the school have submitted an appeal against this.

It was noted that there is no intention to clawback the split site allocation issued for 2021/22 regardless of the outcome of this appeal.

The details of the appeal information submitted by the school were considered by the working group, including written information, photographs and a video.

Members consider the information provided and agreed with the LA assessment that the school does not meet the current split site criteria, as all the buildings are on a single site with no physical barrier or public right of way between them, and the distance is below 300m.

The Working Group:

- a) Noted the report and the information provided;*
- b) Rejected the split site appeal.*

The Forum ratified the working group's recommendations.

8. RECOMMENDATIONS FROM THE HIGH NEEDS BLOCK WORKING GROUP

A report was presented setting out the recommendations from the High Needs Block Working Group held on 14 June 2022.

i. 2021/22 Schools Budget Outturn Report

This report provided the Working Groups with details of the 2021/22 Schools Budget final financial outturn position, in relation to each funding block. Further details were provided in connection with each funding block and members concentrated on the High Needs Block position. It was noted that the outturn position for the 2021/22 High Needs Block (HNB) revealed a circa £6.5m underspend. Some key issues were highlighted.

Members queried some key issues impacting on the HNB budget, including the closure of Wennington Hall school, and welcomed the progress being made in the developments of SEN units in mainstream schools. It was also noted that the number of EHCPs in Lancashire was now in line with the national average, and had been so for a number of years, after historically being higher.

The Working Group:

- a) Noted the report and the 2021/22 Schools Budget final financial outturn position.*

The Forum noted the information.

ii. School Balances and Clawback 2021/22

Recommendations were approved under the Schools Block item

One additional recommendation was highlighted:

The Working Group:

- a) Requested that officers investigate the reasons for nursery schools plans to utilise spare space within their establishments in order to generate additional income being put on hold.*

The Forum ratified the working group's recommendation

iii. Schools Forum Annual Report 2021/22

Recommendations were approved under the Schools Block item

iv. Schools Supplementary Grant 2022 to 2023

Subsequent to the March 2022 Forum meeting, the DfE have confirmed that local authorities and academies will receive their payments for 2022/23 in two tranches.

Payments will be made in May/June 2022 to cover April 2022 to August 2022, and in October/November 2022 to cover September 2022 to March 2023.

The Forum have agreed that the High Needs Supplementary payments will be made on the same basis as for mainstream schools, so these payments will be actioned in two tranches, as set out above.

It was noted that payments for the grants had now been processed and would be on June oracle information. For the final calculation using the May 21 data, the overall rate for the WPN payments has reduced to £625.97 from the initial £630.69 as first forecasted.

Information suggested that supplementary grant funding would be included in the DSG grant for 2023/24.

The Working Group:

- a) Note the report.*

The Forum noted the information.

v. SEND Review Green Paper: Right Support, Right Place, Right Time

At the end of March 2022, the DfE published the SEND Review Green Paper: Right Support, Right Place, Right Time. The consultation set out the government's proposals for a SEND system and seeks views.

The green paper is consulting on a number of proposals to deliver greater national consistency in the support that should be made available, how it should be accessed and how it should be funded.

The county council has been considering the Green Paper proposals, and through the Lancashire SEND Partnership, has been engaging with partners, including schools, to help

shape a possible response. Following a number of consultation events, the proposed timeline for agreeing a response provided for sign off by 24 June 2022.

Once the response has been shared on 24 June, it was proposed that this would be presented to the Schools Forum on 5 July to agree a forum response, with any amendments to be agreed via the urgent business procedure if necessary.

Officers explained that the complexity of the proposals meant that it had taken considerable time to develop a draft response to the consultation to the point that it could be shared with schools and the forum.

Members also discussed the link to the white paper proposals and possible timescales for implementing green paper.

The Working Group:

- a) Noted the report;*
- b) Supported the processed process for agreeing a Schools Forum response to the Green Paper consultation.*

Subsequent to the working group meeting, a copy of the draft Green Paper response agreed by the Lancashire SEN partnership was shared with the Forum. Members considered the responses and made some suggested edits. It was note that a revised draft would be circulated for approval using the Forum's urgent business procedure.

The Forum

- a) Noted the information;**
- b) Ratified the working group's recommendations;**
- c) Supported the submission of a Forum Green paper response, subject to any amendments to be approved under the urgent business procedure.**

vi.HNB Commissioned Place Process 2023/24

As part of the process agreed with the Schools Forum in 2020, an early notification was introduced to provide special schools and PRUs with an indicative number of places that the LA would expect to commission at each school, which would be incorporated in the school budget for the following financial year.

These arrangements had been amended in 2021, and the LA had again been reflecting on the process ahead of the 2023/24 place commissioning and a significant concern related to the availability of summer term census data to enable special school calculations to be produced and issued before the end of the summer term 2022.

The LA was therefore proposing to amend the place commission process for 2023/24, so that the correspondence to special schools will be delayed to the autumn term 2022. This should not cause a significant issue for the schools, as most special schools are full and commissioned place are largely stable. Special schools will also be able anticipate their commissioned number, as it is based on the figures each school includes in the May 2022 census.

In addition, the additional place top up funding arrangements will continue to operate in 2023/24, where the actual number of pupils at each redetermination is greater than the

number of places commission on the budget forecast, so a continued safety mechanism remains built into the system.

No changes are proposed to the PRU process, with correspondence on indicative place numbers for 2023/24 being circulated in autumn term 2022, to include input from the service to refine the commissioned places, and the continuation of the additional place top up funding arrangements as a continued safety mechanism.

The Working Group:

- a) Noted the report;*
- b) Supported the revised commissioned place process for 2023/24.*

The Forum ratified the working group's recommendations.

9. RECOMMENDATIONS FROM THE EARLY YEARS BLOCK WORKING GROUP

A report was presented setting out the recommendations from the Early Years Block Working Group held on 16 June 2022.

i. Early Years SEN Inclusion Fund Group

It was confirmed that the invitation to the last SEN Inclusion Group meeting had been extended to the whole EY working group membership, to facilitate wider discussions with the service.

The Working Group:

- a) Noted the information.*

The Forum noted the information.

ii. Supporting Actions to Raise Awareness of EY Funding Issues with DfE

Subsequent to earlier representations, CC Jayne Rear, the Cabinet Member for Education and Skills had written to the Secretary of State for Education, highlighting the key concerns around funding and recruitment/retention impacting on the sector in Lancashire. A response had been received from Will Quince MP, Parliamentary Under-Secretary of State for Children and Families. Following the reply, a visit to Lancashire had been arranged with senior DfE officials and visits to a maintained and PVI setting were being scheduled.

The Working Group:

- a) Noted the information:*
- b) Welcomed the proposed visit by DfE officials.*

Subsequent to the working group meeting a copy of the letter from the Cabinet Member and the response were circulated to working group members for information.

The Forum ratified the working group recommendations.

iii. LCC Family Safeguarding Model

Officers reported that some initial enquiries had been made following questions raised by the group. It was agreed that a meeting would be arranged with relevant Early Help officers to take discussions forward. Philippa Perks and Jan Holmes volunteered to represent the group at the discussions.

The Working Group:

- a) Noted the information:*
- b) Welcomed the proposed meeting with County Council Officers.*

Subsequent to the meeting a link was circulated providing further information about the Family Safeguarding Model, which is available [here](#)

The Forum ratified the working group recommendations.

iv.2021/22 Schools Budget Outturn Report

This report provided the Working Groups with details of the 2021/22 Schools Budget final financial outturn position, in relation to each funding block. Further details were provided in connection with each funding block and members concentrated on the Early Years Block position. It was noted that the Early Years Block outturn position for 2020/21 indicated a circa £1.5m underspend which meant there would have been an overspend without the circa £2m transfer from Schools Block. Some key issues were highlighted.

Confirmation was provided that the Early Years underspend could be used to assist with any early years DSG adjustment required in July 2022 and towards the additional £1m contribution agreed in the 2022/23 early years budget.

The Working Group:

- a) Noted the report and the 2021/22 Schools Budget final financial outturn position.*

The Forum noted the information.

vii.School Balances and Clawback 2021/22

Recommendations were approved under the Schools Block item

One additional recommendation was highlighted:

The Working Group:

- a) Requested that officers investigate the reasons for nursery schools plans to utilise spare space within their establishments in order to generate additional income being put on hold.*

The Forum ratified the working group's recommendations.

Officers confirmed that investigations were continuing into the questions raised.

viii.Schools Forum Annual Report 2021/22

Recommendations were approved under the Schools Block item

v.Funding Agreement/ Memorandum of Understanding 2022/23

A report was presented that provided a final version of the 2022/23 Funding Agreement/ and Memorandum of Understanding.

The Early Years Consultative Group were given the opportunity to comment and feedback on the proposed changes to the new agreements prior to the final versions being signed off by LCC senior managers. The feedback received was supportive and in agreement to the changes proposed.

The report summarised the changes to each document.

At the working group, members did query the changes in both documents to section 11 'Notice Period and Transfer of Entitlement' around the reasons for the amendment to allow the parent/carer/guardian to reduce the number of funded hours outlined in the agreement.

It was noted that providers could protect themselves against losses due to the staffing commitments they may have made by increasing the number of week's written notice that was needed to implement the reduction.

The Working Group:

- a) Noted the report and the revised agreements.*
- b) Requested clarification of the amendment to section 11 Notice Period and Transfer of Entitlement around the reasons for the amendment to allow the parent/carer/guardian to reduce the number of funded hours outlined in the agreement.*

The Forum ratified the working group's recommendations.

vi. Early Years Working Group Questionnaire

Previous discussions at the working group have highlighted challenges facing the sector.

In order to facilitate feedback from the sector to help inform working group discussions with officers and members, the Working Group Chair initiated the development of a questionnaire, seeking views on some key issues. These included the hidden costs of meeting children's individual needs and ensuring high quality learning when children have additional needs and also about the support available and recruitment and retention issues.

Officers and Early Years members of the Schools Forum contributed to the refinement of the questionnaire and once finalised, this was published as an eform.

A communication was issued on 3 May 2022, via email for the PVI sector and on the portal for maintained settings, inviting colleagues to participate and share their views by completing the eform. A reminder was also issued to all providers on 17 May 2022.

Responses were requested by 27 May 2022 and by the closing date 121 responses had been received.

An analysis of the responses and all the comments received were provided for consideration by the working group.

It was noted that the Speech and Language service received a number of negative comments and less favourable approval ratings. Early years officers present at the meeting explained that there were meeting in the near future with Public Health Specialists who were involved with this service and the matter could also be aired at the 'Best Start in Life' Board. Early feedback suggested that officers were already aware of some of the challenges and were open to making service improvements.

The number of referrals being received by the service was also highlighted, and it was noted that not all referrals were for appropriate children. Work was being undertaken to develop a Speech and Language roadmap to help settings determine appropriate referrals to the service.

The Group also discussed some concerns about other service highlighted in responses, for example Health Visitors. It was agreed that a priority remained to ensure Child minders had access to the Inclusion Fund from September 2022. Work was underway to develop systems that were more joined up across services to assist with targeting delivery, but it was noted that a number of IT challenges remained.

Considerable challenge's remained in connection with the recruitment and retention of staff in the sector and this was further evidenced by the questionnaire responses. The development of a workforce strategy was highlighted, as was the need for colleges to develop relevant courses.

It was noted that many of the challenges highlighted in the responses provided useful evidence that could be shared when the DfE visited the County, to highlight the challenges being faced by the sector in Lancashire.

The Working Group:

- a) Noted the report and the questionnaire analysis and comments;*
- b) Welcomed the actions highlighted in response to concerns raised;*
- c) Noted that evidence from the response would be shared with DfE officials.*

The Forum ratified the working group's recommendations.

vii.2 Year Old Staffing Ratio Change

The children and families minister Will Quince confirmed that the Department for Education will consult 'before the summer' on plans to raise the number of two-year-olds that one member of staff can care for in early years settings in England from four to five.

Information was provided for the group which had been produced by the Working Group Chair, setting out some initial concerns about the proposals.

It was noted that the information had also been presented to the Education Recovery Board.

Members discussed this possible DfE staffing ratio change development and supported the concerns set out in the report.

The Working Group is asked to:

- a) Note the report;*
- b) Supported the concerns set out in the report about the proposed staffing ratio change.*

The Forum ratified the working group's recommendations.

viii.SENCO Level 3 Qualification

Officers provided a verbal update on proposals to develop and offer a SENCO level 3 qualification for Lancashire providers.

A pilot programme covering 2 tranches of learners was suggested.

In line with questionnaire feedback, the costs of provision were seen as a potential barrier to the development and finance colleagues had indicated that it may be possible to pay for the pilot programme centrally, perhaps using some early years block underspends from 2021/22. Initial forecasts estimated a cost of circa £20k.

The Working Group:

- a) Noted the information;*
- b) Welcomed the proposed development;*
- c) Supported the use of reserves to meet the estimated £20k costs of the pilot programme.*

The Forum ratified the working group's recommendations.

ix. Working Group Chair

Peter Hindle reported that he would be resigning from the Forum and the working group after the October 2022 round of meetings.

Philippa Perks had kindly volunteered to Chair the group after Peter's departure.

A formal item on the next working group agenda would seek to confirm the new appointment.

The Working Group:

- a) Noted the information.*

The Forum ratified the working group's recommendations.

10. APPRENTICESHIP LEVY STEERING GROUP

A report was presented providing an update of the recommendations from the Apprenticeship Levy Steering Group meeting held on 16 June 2022.

Information was provided around the number of Requests for Funding that had been received and approved since October 2021 and the value of the apprenticeships.

It was highlighted that the Pooled Payroll issue was still unresolved. A LGA round table meeting with ESFA took place September 2021, but issues remain with a focus on finding a solution still needed. Details will be updated via the portal as soon as there is anything to report.

Procurement of contracts was the main focus of activity for the service through spring and summer 2021. Most of this process has now been completed for the schools side and a number of new contracts have been awarded.

It was noted that engagement with school was still proving a challenge for the team, especially post covid, with schools not spending their share of apprentice levy income. The working group offered some suggestions to assist with this, which included many of the channels that the team were already utilising.

Information was also shared on Apprentice Incentive Payments and Recruitment issues, plus a financial update. It was noted that total spend to date on the school apprenticeship levy was £2,547,555

The Group:

- a) Noted the information;*
- b) Expressed frustration at the continued difficulties caused by school pooled payroll issues;*
- c) Thanked the Apprenticeship Levy Team for their continued hard work and dedication during difficult circumstances.*

Subsequent to the steering group meeting further information about the Levy clawback was provided. For the period of April 2021-March 2022:

- The schools had a potential levy budget of 1.5m and only spent £871K of that.*
- In comparison to LCC who spent £1.2m.*
- LCC continue to outpace the schools in terms of what they are spending.*
- The total claw back for the levy as a whole over this period was £713K but we are unable to give you a figure of how much of this was the schools share. However, we know from the lower spend attributed to the schools that the clawback will have been a significant share of the schools levy.*

The Forum:

- a) Ratified the working group's recommendations;**
- b) Noted the additional information provided.**

11. RECOMMENDATIONS FROM THE CHAIRS' WORKING GROUP

A verbal update was provided on the recommendations from the Chairs' Working Group meeting held on 5 July 2022.

Regular reports have been presented to the Chairs' Group/Forum around Schools in Financial Difficulty (SIFD) categorisations.

Now that the 2021/22 outturn position for schools is available, the SIFD categorisation analysis has been run. A copy of the analysis for all schools at March 2022 was provided and the March 2021 analysis was shared for comparison.

In addition, sector by sector data was provided for the group.

The group considered the report and the analysis provided and noted that the outturn categorisation for March 2022 showed a marginal improvement on that from a year earlier. The group also discussed the significant cost pressures facing schools going forward, including energy and wages, and noted that pupil numbers in the county were now beginning to reduce, starting with the early years and primary phases. The current forecast for increases in government allocations to Lancashire also showed a decline from recent years.

The Group

- a) Noted the report and the marginally improved position on the categorisation analysis;*
- b) Noted that there were significant school funding challenges ahead that would need to be closely considered by the Schools Forum.*

The Forum ratified the working group's recommendations.

12. SUPPORT FOR UKRAINIAN FAMILIES

Information had been requested at a previous Schools Forum meeting about the support available in Lancashire for Ukrainian families arriving in Lancashire.

Updates have been provided to schools around this support in the regular Education Bulletin. An extract from this guidance was provided for the Forum

In early discussions, it has been stressed that not all the education funding that is allocated to Lancashire will be fully passported to schools as monies will need to be retained to provide Early Years support, SEND support, Early Help, EAL support etc. A decision will be made shortly as to how much is top sliced and how much is allocated to the schools. Communications will be issued via the education bulletin once the amount to be passed to schools is determined, and there will be clarification as to how and when any payments will be made. For future years, DSG funding will capture Ukrainian pupils on roll from the October 2022 census.

For information the DfE allocations for eligible education top-up funding that local authorities will receive for Ukrainian refugee pupils are:

- Early Years - £3,000 per pupil
- Primary - £6,580 per pupil
- Secondary - £8,755 per pupil

Officers confirmed that they were finalising the arrangements for the allocations to schools and information would be issued as soon as possible.

The Forum:

- a) Noted the report.**

13. URGENT BUSINESS

No matters of urgent business have been considered since the last meeting.

14. FORUM CORRESPONDENCE

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

15. ANY OTHER BUSINESS

No items of AOB were raised.

16. DATE OF FUTURE MEETINGS

The next scheduled Forum meeting will be held at 10.00 am on Tuesday 18 October 2022. Arrangements for the meeting will be confirmed in due course.

A copy of the forum schedule of meetings for the 2022/23 academic year was also provided.

LANCASHIRE SCHOOLS FORUM
Date of Meeting: 18 October 2022

Item No: 6

Title of Item: Education Management System (Impulse) Update

Appendices A

Executive Summary

This report provides an update on Education Management System.

Recommendations

The Lancashire Schools Forum is asked to:

- a) Note the report.**

Background

The Lancashire Local Authority Education Management System is no longer fit for purpose and is being replaced. The LA have put together a project team who are taking this opportunity to procure and develop a system that meets all the education statutory requirements within the LA but also aims to address some of the 'pain points' felt by key stakeholders including schools, particularly around data sharing between the LA education teams and schools, and vice versa.

Emma Lambert is the Service Lead in the project team and will share the aims and draft specifications of the project with colleagues, highlighting the potential benefits to school colleagues.

LANCASHIRE SCHOOLS FORUM
Date of Meeting: 18 October 2022

Item No: 8
Title of Item: Inclusion Hubs

Appendices A
Executive Summary

This report provides an update on the work of the Inclusion Hubs.

Recommendations

The Lancashire Schools Forum is asked to:

- a) Note the report.**
- b) Express any initial views on the Inclusion Hub report.**



Background

Members requested further information about De-delegation for Primary Inclusion Hubs which are again proposed in 2023/24.

A copy of the report for Primary Inclusion Service de-delegations is attached as Appendix A.





District Inclusion Hub evaluation project 2022

We want to thank all of our schools for their continuous hard work and dedication in supporting our most vulnerable children, particularly throughout the past few years of unique challenge. Additionally, we want to extend specific thanks to those school colleagues who took the time to respond to the survey and share their thoughts and views with us.



Executive summary

i. It is difficult to obtain an accurate estimation of schools' participation in the work of the District Inclusion Hubs for all districts, although more than half of the District Inclusion Hubs reported schools' engagement in excess of 75% during the last academic year. ii. Over 400 children have been provided with direct support via the District Inclusion Hubs in 6 districts. iii. The District Inclusion Hub model varied across areas although most offered networking and training events and direct support for individual pupils at different levels, including out-reach and in-reach support iv. The proportion of pupils with education, health and care (EHC) plans that attended schools participating in the District Inclusion Hubs has increased over the last four years in ten districts. District Inclusion Hub schools generally showed lower percentages of EHC plans when compared to all mainstream schools within their districts.

v. Suspensions generally reduced for schools participating in the District Inclusion Hubs. vi.

Exclusions generally reduced for schools participating in the District Inclusion Hubs.

vii. Schools who participated actively in the District Inclusion Hubs saw lower exclusion rates than those who did not.

viii. All participating schools shared a good understanding of the vision and aims of the District Inclusion Hubs, although emphasis seems to have been more on support for schools where children presented with behaviour that challenges. ix. Many schools within the District Inclusion Hubs felt that the hubs were beneficial and that their schools benefited from the support provided by them.

x. District Inclusion Hubs valued what their hub could offer, including training, access to immediate expert advice/input, sharing of knowledge and supervision and the use of alternative provision. xi. District Inclusion Hubs discussed ways to improve the impact of their hubs, including more training, greater access to specialist professionals, more varied physical spaces (e.g. sensory rooms), greater funding and additional PRU/SSS involvement.

xii. A more systematic approach to data collection in the future is likely to be helpful.

1.1. Inclusion Hubs - background

De-delegation of funding to support Inclusion Hubs was first agreed by the High Needs Block Working Group in October 2019. The purpose of these Inclusion Hubs was to promote inclusion and reduce exclusions in mainstream primary schools through the creation of:

- Local training and collaboration networks
- Local systems for advice and support
- Networks to support inter-district collaboration

It was also anticipated that schools within each district would develop a local response to the particular challenges encountered within their geographical area. It is also the case that different approaches have been adopted to reflect the resources available within a particular district and which included for example support from neighbouring pupil referral units/short stay schools, special schools and other service providers.

Schools Forum and District Inclusion Hub leads sought an evaluation of the effectiveness of the Lancashire District Inclusion Hubs in meeting the pre-determined objectives identified above. The project was completed by colleagues within the Educational Psychology teams with support from colleagues across Lancashire, including the head of the Inclusion Service, data services, the Education Improvement team, and colleagues within the District Inclusion Hubs.

1.2. The Offer

A number of the districts have organised and/or are in the process of organising conferences for all primary schools within the district with a view to publicising and involving schools in the development of the offer. These events also provided/provide an opportunity for networking, inter-school support and the sharing of good practice. Some districts have also developed their use of online tools, such as Padlet, to share training resources as well as information about District Inclusion Hub events, the support available via the hub and referral mechanisms

Most of the District Inclusion Hubs offered training and resources accessible to all schools within a district. These included for example nationally accredited training programmes, with their own evidence bases, such as ELSA and ELKLAN as well as more bespoke training packages targeting specific aspects of development such as social skills or executive functioning. Other training programmes offered focused on methods that could be used to monitor progress and development, or support the identification of approaches to intervention, and which included for example training on the PSED PIVATs or functional behavioural analysis.

Different consultation models were used by districts, either separately or in combination, to assist with the identification of support for individual children by external specialists as well as support meetings organised across different clusters of schools within a district and less formalised school to school support meetings.

In addition, support was provided for individual pupils in different ways. There were examples of support being offered as part of early intervention with a view to preventing the escalation of need. Other District Inclusion Hubs offered an approach that included a rapid response, often provided by external specialists, where a child/school was considered to be in crisis.

The support was provided in different ways that included the observation and assessment of a child by external specialists, which were either provided directly or schools were supported with funding to commission their own. Graduated packages of support that could include out-reach work were offered by many District Inclusion Hubs, as well as time-limited respite placements in special or short stay schools, where these were available to local schools. Many of the respite placements also included support with reintegration as well as training for staff within the venue of the special or



short stay school provider and/or within the originating school. Some District Inclusion Hubs had developed links with local secondary schools and at least one secondary pupil referral unit was offering support with transition into the secondary phase of education for some of the most vulnerable pupils at the upper end of key stage 2.

Much of the support provided at individual pupil level was subsidised to a greater or lesser extent through the funding made available to the District Inclusion Hub. It is also perhaps worth mentioning that academies within at least one of the District Inclusion Hubs contributed directly in order to be able to access the resources and support available.

1.3. Methodology

The evaluation comprised two elements. The first of these considered data relating to participating District Inclusion Hub schools in comparison with all schools within the district, focusing on the inclusion of pupils with EHC plans within the mainstream schools, suspensions and exclusions and attendance.

The second part of the evaluation used an online survey, created using Microsoft Forms (see Appendix 1), that was distributed via Hub Leads who were asked to cascade to member schools. The survey was open for approximately three weeks from the beginning of July. It comprised of a range of open and closed questions around the themes of 'hub vision', 'currently used resources/interventions', 'what is helpful' and 'progress trackers'. The survey link was distributed on email via the schools' portal. Prospective participants were prompted with reminders on three occasions. It should be noted that whilst best endeavours took place to ensure maximum response rates, the survey was distributed relatively late within the school year and as such, response rates were somewhat muted.

The closed questions of the survey were tallied, and basic analyses were conducted. Responses to the open-ended questions were subject to a shortened thematic analysis approach, where overarching key themes were extracted without prior reference to the survey questions.

1.4. Results Local authority collated data

Colleagues within data services, alongside school improvement, supported the gathering and analysis of data collected in relation to EHC plans, suspensions and exclusions. It is also important to note that the relatively small number of exclusions may have affected disproportionately affect the presentation of the data. These data sets were considered alongside the District Inclusion Hub attendance data that was collected up to the end of the 2019/20 academic year and more recently from the District Inclusion Hub evaluation reports were produced separately in 2021/22 and provided by 6 of the 11 District Inclusion Hubs.

The data from the first of these sources is very limited. It is, however, the only information that is available for all of the District Inclusion Hubs and so has been used as the comparator for the quantitative analyses presented in the tables below. Any interpretation of these results must be approached with caution because of the limited data available and because some of it was collated during the time of the pandemic. Furthermore, the variability of the offer and the extent to which individual schools have



accessed different levels of support makes it difficult to generalise outcomes and thus to provide an entirely accurate appraisal of the impact of the District Inclusion Hubs at the current time. This is an area for development in the future.

Schools' participation in District Inclusion Hubs

It is possible to confirm 81 schools' engagement in District Inclusion Hubs up to 2020, although it is probable that far more schools supported and were supported by the work of the hubs. Furthermore, it seems likely that schools' participation will have been affected by the pandemic and the reduced attendance of pupils in schools from March 2020. In addition to the numbers presented above, representatives from three special schools and one short stay school also attend the District Inclusion Hub forums. Stepping Stones Short Stay School is part of the District Inclusion Hub support network for Hub 1 (Lancaster) and Kirkham Pear Tree School supports Hub 4 (Fylde), Kingsbury School is part of Hub 8 (West Lancashire) and Cribden House School supports Hub 14 (Rossendale).

Data obtained from the 6 District Inclusion Hubs that provided reports indicates that at least 75% of schools were involved at some level in their local District Inclusion Hub and that the majority of schools attended District Inclusion Hub conferences, where these were held, cluster consultation or network meetings and/or training events. It is possible to confirm that direct support was provided for 424 children attending schools within these District Inclusion Hubs at varying levels, as described above in Section 1.3, with District Inclusion Hub 7 (South Ribble) confirming that over 1,900 hours of support has been provided in the last year.

Inclusion of pupils with EHC plans

The information provided in the table below shows the percentage of pupils with EHC plans in participating schools in comparison with the percentage of pupils with EHC plans in all primary mainstream schools within each district, up to 2020. It can be seen from the presented data that the proportion of children with EHC plans in participating schools is generally below that of all schools within a district. The only exceptions to this are Hub 2 (Wyre) and Hub 7 (South Ribble) where there has been an increase and Hub 4 (Fylde) where the two figures are the same. The District Inclusion Hub reports, where these were provided, indicates that where direct support for children was provided this was almost always for children presenting with behaviour that challenges, rather than for those with EHC plans, which might provide some explanation for the reduced numbers. It is also perhaps worth noting that although inclusion was one of the original aims of the District Inclusion Hub project, the number of pupils with EHC plans supported within schools, at best can only be considered to be a proxy indicator and not one that was made explicit from the outset.

The table does also show that, except for two districts, the percentage of pupils with EHC plans supported in mainstream hub participating schools has increased between 2017/18 and 2020/21. Further analysis of the data does not provide evidence of any correlation between the number of participating schools or number of pupils on roll in these schools and the percentage of pupils with EHC plans.



District	District hub number	District EHCP % hub schools	District EHCP % all schools	EHCP % 2017/18 vs 2020/21
Lancaster	1	1.3	2.1	0.42
Wyre	2	1.7	1.3	0.09
Fylde	4	2.2	2.2	0.56
Preston	6	0.9	1.7	-0.24
South Ribble	7	2.3	1.6	0.13
West Lancs	8	1.4	1.5	0.07
Chorley	9	2.0	2.1	0.74
Hyndburn and Ribble Valley	11	1.4	1.5	0.58
Burnley	12	1.3	1.9	0.28
Pendle	13	1.4	2.4	0.72
Rossendale	14	1.7	2.0	-0.29

Exclusions and suspension

Generally, the number of suspensions and exclusions within the districts (for the schools listed as participating in the District Inclusion Hubs up to the end of the 2019/20 academic year) gradually declined between 2017/18 and 2020/21 (see Figure 1 and Figure 2).

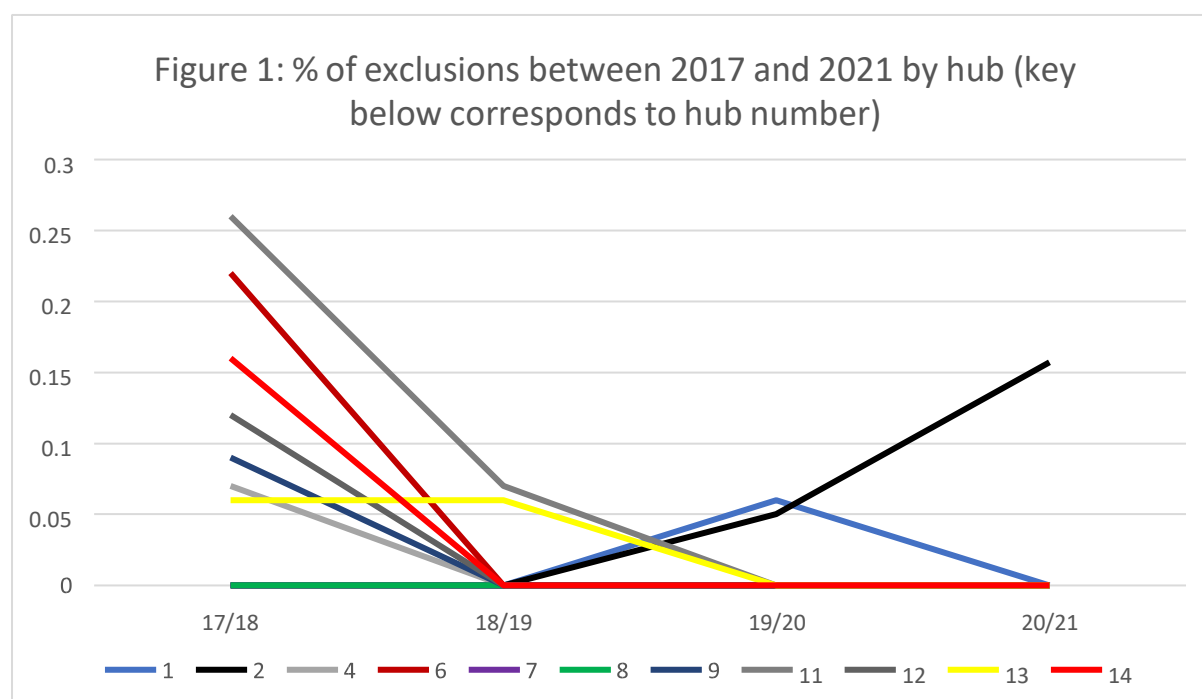
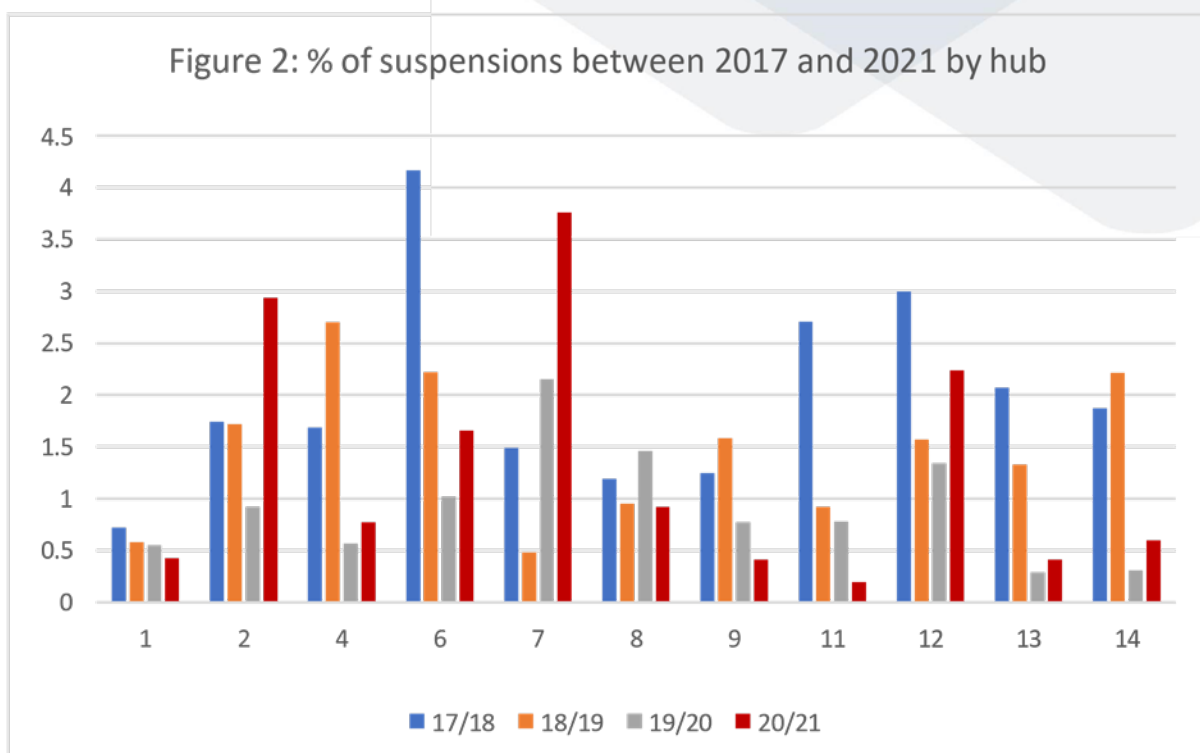


Figure 1 shows that exclusions generally reduced within the District Inclusion Hubs. In 2019/20, Hub 1 (Lancaster) and Hub 2 (Wyre) were the only districts to exclude a child. The remaining hubs did not exclude any children permanently. This picture remained the same in 2020/21 with Hub 2 (Wyre) being the only district to record an exclusion.



The picture for suspensions is less straightforward. Hub 2 (Wyre) and Hub 7 (South Ribble) show increases in comparison with 2017/18 and over the last four years. Hub 6 (Preston), and Hub 12 (Burnley) showed larger increases in suspensions than other districts in comparison with other years but not overall.

Suspensions and exclusions in district vs. Inclusion Hub

Information in table below shows the trend of suspensions and exclusions within the Inclusion Hub (of the schools that were listed as attenders up to the end of 2019/20) when compared with all the schools in the district. Generally, schools who attended and participated in the hubs saw reduced exclusions, despite increases in suspensions. Hubs 1 (Lancaster), 2 (Wyre) and 3 (Fylde) appeared to receive the least impact of attendance at the Inclusion Hubs.

Hub	Suspensions	Exclusions
Lancaster (1)	□	□
Wyre (2)	□	□
Fylde (4)	□ then □	□
Preston (6)	□	□ (none in neither district nor hub)
South Ribble (7)	□	□
West Lancs (8)	□	□

Chorley (9)	□ then □ (from 2019)	□
Hyndburn and Ribble Valley (11)	□	□
Burnley (12)	□	□
Pendle (13)	□ then □ (from 2019)	□ then □ (from 2019)
Rossendale (14)	□ then □ (from 2019)	□

1.5. Survey outcomes

A total of 35 responses were received, with each hub being represented except Hub 2 (Wyre). The hubs with the most responses were Hubs 6 (Preston), 7 (South Ribble) and 8 (West Lancashire); (Q1). 80% of respondents stated that they currently regularly attend hub meetings (Q2) and the majority stated that they had a secure understanding of the hub's vision and how effective it was. With 69% (24 out of 35) members stating that the hubs were 4 or 5 (completely) effective on a scale of 1 to 5 (Q4).

Generally, hub members felt that they had a secure understanding of what the hubs offered in their district and how to access such support (89%; Q6). With a smaller majority reporting that they felt they had an influence over the kinds of support their hub offered (69%; Q7).

The shortened thematic analysis approach highlighted that most members had a strong understanding of the hub's vision (Q3), which was in-line with the original purpose of the Inclusion Hub model to enhance inclusion and reduce exclusions. At least one member from each hub (that responded) included a response that noted 'increased inclusion' and 'reduced exclusion'. For example, Hub 7 (South Ribble) said "for schools to be inclusive settings to reduce exclusions". Similarly, Hub 11 (Hyndburn and Ribble Valley) stated that their hub's vision was to "provide training and support to schools with implementing universal high-quality teaching which promotes inclusion. Reduce fixed term and permanent exclusions". A number of respondents spoke specifically about the children that they felt the hub aimed to support, including those with "behaviour challenges" Hub 7 (South Ribble), those "on the autistic spectrum" Hub 9 (Chorley) and Hub 8 (West Lancashire), those in "KS1", Hubs 9 (Chorley) and 8 (West Lancashire) and those with "social, emotional and mental health (SEMH) difficulties" Hubs 14 (Rossendale) and 6 (Preston). Two responses felt that they were not clear on the hub vision, these were from Hubs 6 (Preston) and 8 (West Lancashire).

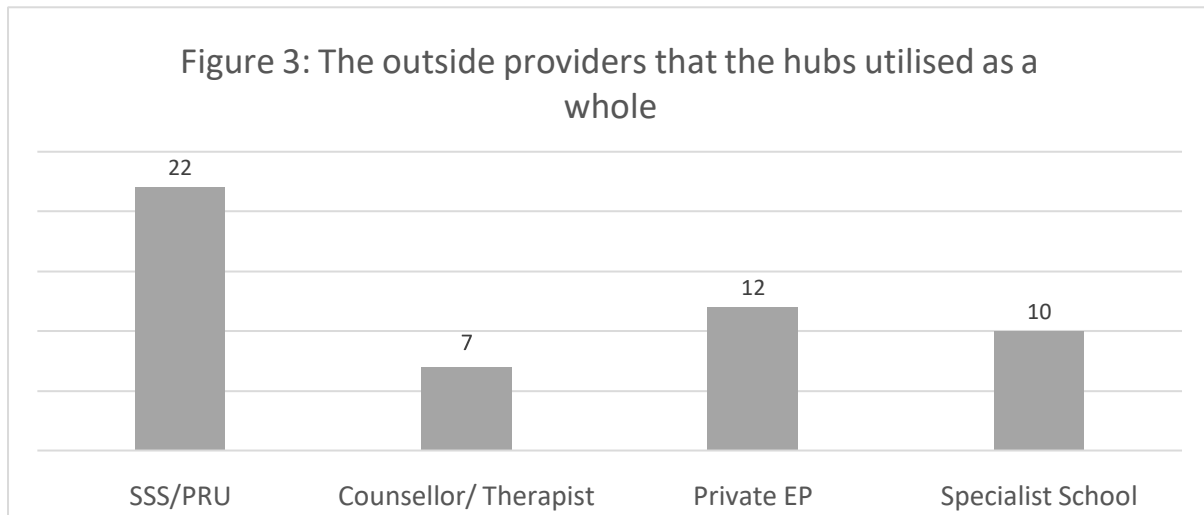
Currently used resources/interventions

Participants reported that 9 hubs utilised instances of 'managed moves' within their schools (Q8 & Q9). Within the past academic year (2021-22) schools indicated that at least 15 children had been subject to a 'managed move', with some schools noting that in previous years "lots of children" were supported in this manner.

424 children were helped directly in the previous academic year (2021-22) using funds from the District Inclusion Hubs (Q13). Whilst some children may not have been helped directly, one school noted: "no individuals, but all classes have benefitted from staff

training in inclusion and universal high quality teaching practices" Hub 11 (Hyndburn and Ribble Valley).

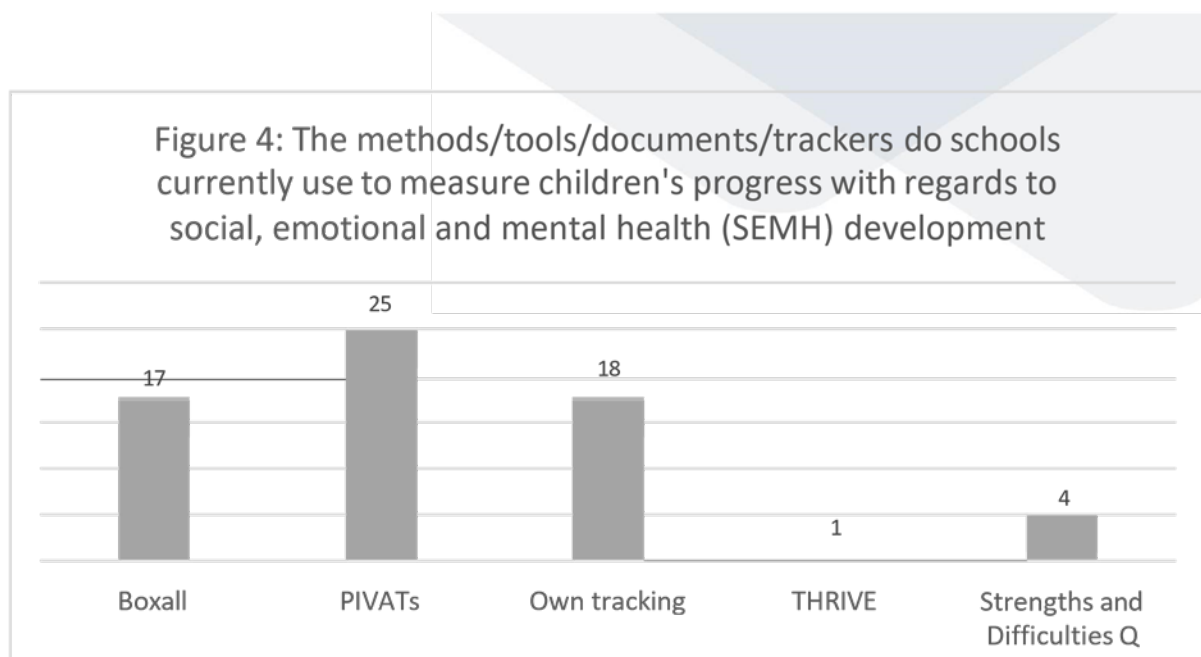
Participants were asked to state the outside providers that they utilised (Q10 & Q11; Figure 3). Hubs also stated that they in addition to the suggested options, they also utilise "specialist TA's", "Child and Family Wellbeing support services", "local authority advisors", "the specialist teaching service" and "educational partnership officers".



Progress trackers

Participants were asked about the methods, tools, and trackers they use to measure children's development with regards to SEMH. The results are seen in Figure 4 (Q14).

Schools noted that generally their hubs did not promote a specific tool (Q15 & Q16), and if they did, they were unaware of what that was. Of the hubs that noted that there is a promoted tool, the majority were encouraged to use a mix of PIVATs, the PSED tool, THRIVE and the Boxall. Some participants interpreted 'promote' as 'subsidised' and this was true in the case of THRIVE, which one school noted was paid for by the hub.



What is helpful?

The shortened thematic analysis approach highlighted what schools felt was most helpful when working towards the hub's vision (Q12). The responses roughly split into five categories:

- Access to immediate expert advice/input.
- Training and CPD for staff.
- Sharing of knowledge and supervision.
- Use of alternative provisions.
- Awareness and running of the hub.

Access to immediate expert advice/input concerned school's ability to utilise hub connections and finances to gain timely support from educational psychologists, funding for additional support staff and support from colleagues specialising in SEMH needs to "prevent exclusions" Hub 12 (Burnley).

Training and CPD for staff focussed on upskilling whole school staff to develop their awareness, confidence, and skills in and of "extreme behaviours", Hub 8 (West Lancashire) and "PIVATS", Hub 14 (Rossendale) / "Cognition and Learning", Hub 7, (South Ribble). More general "training" was also noted as helpful.

Sharing of knowledge and supervision was noted specifically by Hub 7 (South Ribble) as important. Particularly the use of "discussion [of cases] in a supervision style solutions focussed way".

Use of alternative provisions particularly revolved around access of alternative provisions in a swift manner, as well as in a preventative way following a placement at an alternative setting. For example, Hub 8 (West Lancashire) noted that the hub was helpful in providing support during a time where "services [are] sporadic and unpredictable".

Finally, *awareness and running of the hub* focussed on hub's suggestions that it has been helpful when hub meetings are "face to face", Hub 7 (South Ribble), when new SENDCos/ head teachers are introduced to the hub upon arriving in post, Hub 6 (Preston). Other respondents reported it was better when "more schools use the service", Hub 9 (Chorley) and that it can be "frustrating" when hubs work hard to be inclusive but are unable to access alternative provisions when they are needed due to non-attending schools "taking up places", Hub 6 (Preston).

What hubs said would help them reach their vision

The remaining data was considered using a shortened thematic analysis approach. A considerable proportion of the codes fell under the theme 'what we need more of/ what would be helpful'; this is particularly the case for responses to Q5, Q12, Q18 and Q19. The responses to these questions are presented here in a combined format as the overarching theme of 'what hubs said would help them reach their vision' emerged independent of question-specific coding. There were six principal areas where schools identified what might help them:

- Staff training.
- Access to and support from specialist professionals.
- PRU/SSS involvement.
- The wider SEND system.
- Physical spaces.
- Funding.



- Needing more.
 - Wanting funding to return to a school level.
 - Better funded and more pupil referral units/short stay schools.
- A better whole-county strategic plan.

Staff training was a point made across a range of hubs, including Hub 7 (South Ribble), Hub 8 (West Lancashire) and Hub 11 (Hyndburn and Ribble Valley). Schools felt that they required additional staff training in areas such as "nurturing approaches", "positive relational approaches", "emotion coaching", "ACES" and "managing behaviour".

Access to and support from specialist professionals tended to focus on the desire for further involvement from educational psychologists, specifically. Other specialist professionals included specialist teachers and "specialist behavioural support". Often the word 'specialists' was used with a request for 'more', rather than specific specialists requested.

A few schools noted the need for enhanced *PRU/SSS involvement*. Including the requirement for support from these provisions, as well as the ability to access and place children within their provisions, if needed. Schools spoke about PRU/SSS involvement as a key facet to avoiding exclusion. For example, Hub 6 (Preston) noted that "PRU support to keep children in school who are at risk of exclusion". Some schools felt that schools who were not active within the hub were, at times, "blocking spaces", for example, Hub 1 (Lancaster).

Schools raised several concerns around *the wider SEND system*. Including those within LCC and external agencies, such as ELCAS/CAMHS. Schools felt that often children do not receive timely and appropriate mental health support from mental health professionals, leading to many schools opting to pay for counselling support services. For example, Hub 14 (Rossendale) noted that "many are permanently excluded or become home educated", due to difficulties with mental health. Others felt that it would be helpful for the SEND service to be more "supporting" and be better at "listening", Hub 11 (Hyndburn and Ribble Valley).

A number of schools spoke about the difficulties they face with the physical environments of their provisions. One school spoke about a desire to "enhance the facilities we have for children with sensory needs", Hub 11 (Hyndburn and Ribble Valley). Similarly, another discussed a want to develop "an additional room (sensory or just calming) for our autistic pupils", Hub 6 (Preston). In addition, one school shared their hopes for developing a nurture provision, Hub 9 (Chorley). Finally, Hub 1 (Lancaster) discussed a need for "higher fences around school, more break-out rooms-counselling for parents". In addition, this school spoke about a desire for greater parental understanding of the SEND system and its challenges.

With regards to *funding*, it will be considered in four key areas:

- *Needing more*. Most hubs expressed a desire for a net increase in monetary funding for their hubs and schools. For example, Hub 6 (Preston) said "it would be extremely helpful to further extend the financial support as our budget is already stretched to capacity".
- *Wanting funding to return to a school level*. Two participants in Hubs 11 (Hyndburn and Ribble Valley) and 9 (Chorley) expressed a desire for funding to be removed from the hub and given back to their school as they felt this would better meet the needs of their individual children. For example, "I would like to



keep the money that goes to the hub- I can spend it on the support my children need", Hub 9 (Chorley).

- *Better funded and more pupil referral units/short stay schools.* Hubs across the county expressed a need for increased places at pupil referral units/short stay schools. Hub 8 (South Ribble) felt strongly that they require a district pupil referral unit as a matter of urgency. Additionally, Hub 12 (Burnley) expressed a concern that there are limited options for children in their district for short term placements now that Hendon Brook short stay school has closed.
- *A better whole-county strategic plan.* Schools across the county noted that they felt their districts, and therefore hubs, did not have equality of access to SSS provision due to their location, Hub 8 (West Lancashire). Additionally, Hubs 6 (Preston), 7 (South Ribble) and 8 (West Lancashire) felt that the local authority should provide consistent and stable funding for the hubs, as well as an offer that matches the needs of each district. For example, "appropriate financial commitment from the LA", Hub 6 (Preston), "the money to be maintained and not voted on annually so we know we can develop the provision", Hub 7 (South Ribble) and "accurate costing of interventions based on the needs of the children in the district", Hub 8 (West Lancashire).

Many participants used the survey to voice wider concerns including concerns around the "tremendous pressure" schools are under, Hub 14 (Rossendale) and a feeling that they are "sticking plasters", Hubs 12 (Burnley) and 14 (Rossendale). Concerns about the District Inclusion Hub offer and lack of perceived equality of services were raised by respondents from the Hub 8 (West Lancashire). Many schools noted that they felt that the availability of quality alternative provision was limited, and they felt uncomfortable about the choices they had to make to pay private providers for example "why are the inclusion hubs paying for private providers? They are making money from our vulnerable children, and this does not feel right", Hub 14 (Rossendale).

Praise

Six hubs were expressive in their praise of the work their colleagues within schools and those within the wider District Inclusion Hubs do. Hub 7 (South Ribble) felt that their "hub runs exceptionally well with a clear plan for the coming academic year". They said that "the hub works well for us", "they are amazing!", "the support the hub has brought has been substantial". Additionally, a number of schools praised the work of the SENDCos and headteachers, Hubs 9 (Chorley), 14 (Rossendale), and 11 (Hyndburn and Ribble Valley). Some schools recognised the benefits of the hub in providing easy and timely access to support and services, including specialist professionals.



1. Which hub are you part of (please give name of hub or number)?
2. Do you attend hub meetings and/or liaise with your hub lead/other members at

Appendix 1

least twice a year? Yes/no.

3. Please summarise what you feel that your hub's vision is for your area in a maximum of two sentences.
4. Based on your understanding of your hub's vision, please rate from 0-5 (0= not at all, 5= completely), how effective you feel that the hub is in terms of working towards the vision?
5. Is there anything else that would be helpful to you in achieving the hub's vision?
6. Do you feel that you have a good understanding of the support your hub offers and how you can access this? yes/no.
7. Do you feel that you have some influence in the kind of support that your hub offers? Yes/no.
8. Have you made use of a 'managed move' system of supporting any of the children within your school? Yes/no.
9. If so, how many children has this intervention been used with?
10. Please select any outside providers that your hub partners with as part of the offer. If you select 'other', please state what this is. Options: Private EP, Private clinical psych, Special school, PRU/SSS, Counsellor/therapist.
11. Using the providers given in question 9, please state below the support and number of hours delivered, and whether this is provided directly to your setting, or to the inclusion hub systemically, e.g., Private educational psychologist-individual assessment with child-5 hours, Private clinical psychologist-attachment training to the hub-2 hours. Some forms of support may be individual assessment, short term placement at PRU, counsellor, training for school staff, training for inclusion hub, staff supervision, support for families.
12. Of the things listed above, please list which are the most helpful to you in working towards the Inclusion Hub's vision.
13. How many children within your school have been offered direct support using funds from the district inclusion hub?
14. What methods/tools/documents/trackers do you currently use in school to measure children's progress with regards to SEMH development? Examples may include PIVATs, Boxall Profile, own tracking document.
15. Does your inclusion hub promote a tool for measuring children's progress with regards to SEMH, and if so, what is this?
16. Do you use their recommended tool? Yes/no.
17. If not, why not?
18. Is there anything that would help your setting to be more inclusive?
19. Any other comments.

LANCASHIRE SCHOOLS FORUM
Date of Meeting: 18 October 2022

Item No: 9

Title of Item: Energy Cost Update

Appendices A refer
Executive Summary

This report provides an update from Energy Team.

Recommendations

The Lancashire Schools Forum is asked to:

- a) Note the report.**

Background

The prices for the energy are still not available. These should be received by the end of October. At this moment, there is no further information that can be provided other than what was published on School Portal on 6th October. This letter can be found in Appendix A.

Currently, the team is trying to get more clarity on what to expect but they have no further information and are waiting on the suppliers.

6th September 2022**October 2022 annual energy price increase**

(Please forward to the person with financial responsibility)

As you will be aware the prices for gas and electricity on the LCC contracts are due to change on **1st October 2022**.

LCC's strategy is to buy energy at different points throughout the contract period. This helps reduce the risk of having to buy all the energy when prices are highest. Due to this the contract has performed better than the wholesale market. However, because the market has been so volatile for so long it has been impossible to completely escape significant price increases.

Because purchases are made up to the contract start date it is only close to the start date, when most of the purchases are done that our procurement agents can be confident of the price increases.

The average projected increase across the whole portfolio is expected to be:

Gas-150%**Electricity-83%**

The new prices will be on the October bills that are issued towards the end of November. Independent market testing tells us the prices achieved are 38% and 26% lower than the market rate for gas and electricity respectively.

The energy engineers are available to offer practical advice on reducing energy consumption. If you would like their assistance or have any questions, please contact:

Energy.team@lancashire.gov.uk

LANCASHIRE SCHOOLS FORUM
Date of meeting 18 October 2022

Item No 10

Title: Recommendations of the Schools Block Working Group

Appendices A-D refer

Executive Summary

On 20 September 2022, the Schools Block Working Group considered a number of reports, including:

- Schools Block Funding Arrangements 2023/24
- Inclusion Hub Report
- Service De-delegations 2023/24.
- Clawback Exemption Request

A summary of the information presented, and the Working Group's recommendations are provided in this report.

Recommendations

The Forum is asked to:

- a) **Note the report from the Schools Block Working Group held on 20 September 2022;**
- b) **Ratify the Working Group's recommendations.**

Background

On 20 September 2022, the Schools Block Working Group considered a number of reports. A summary of the information presented, and the Working Group's recommendations are provided below:

1. Schools Block Funding Arrangements 2023/24

On 19 July 2022, the DfE made announcements about the 2023/24 school funding arrangements.

Overall, core schools funding (including funding for mainstream schools and high needs) is increasing by £1.5 billion in 2023/24 compared to the previous year.

Funding through the schools NFF is increasing by 1.9% overall in 2023-24, and 1.9% per pupil, compared to 2022-23.

Government announcements confirm that the DfE will move forward with its plans to implement a direct national funding formula (NFF). As part of the transition to the direct NFF, in 2023/2024, local authorities will be required to start bringing their own formulae closer to the schools NFF, with the aim of moving to the direct NFF by the 2027 to 2028 funding year, or sooner.

As members will be aware. Lancashire has already adopted the NFF as the local funding methodology, so there are no implications in 2023/24 from DfE requirements.

National Funding Formula (NFF) 2023/24

The basic structure of the National Funding Formula (NFF) remains unchanged for 2023/24, but DfE have increased factor values and made some other changes to the arrangements. Further details are provided below:

Key changes to the schools NFF in 2023 to 2024 are:

- rolling the 2022 to 2023 schools supplementary grant into the NFF by:
 - adding an amount representing what schools receive through the grant into their baselines
 - adding the value of the lump sum, basic per pupil rates and free school meals Ever 6 (FSM6) parts of the grant onto the respective factors in the NFF
 - uplifting the minimum per pupil values by the supplementary grant's basic per-pupil values, and an additional amount which represents the average amount of funding schools receive from the FSM6 and lump sum parts of the grants
- increasing NFF factor values (on top of the amounts we have added for the schools supplementary grant) by:
 - 4.3% to free school meals at any time in the last 6 years (FSM6) and income deprivation affecting children index (IDACI). DfE say that this additional support directed to disadvantaged pupils, by increasing the FSM6 and IDACI factors in the schools NFF by a greater amount than other factors,

means that a greater proportion of schools NFF will be targeted towards deprived pupils than ever before. 9.8% of the schools NFF will be allocated according to deprivation in 2023/24. 2.4% to the basic entitlement, low prior attainment (LPA), FSM, English as an additional language (EAL), mobility, and sparsity factors, and the lump sum.

- 0.5% to the floor and the minimum per pupil levels (MPPL)
- 0% on the premises factors, except for Private Finance Initiative (PFI) which has increased by Retail Prices Index excluding mortgage interest payments (RPIX) which is 11.2% for the year to April 2022

Minimum Pupil Funding

The DfE announcements included the relevant minimum pupil funding (MPF) levels for primary and secondary schools, which incorporate the 3.37% uplift for 2023/24:

- The primary schools, the MPF level will be £4,405 per pupil in 2023/24 compared to £4,180 per pupil in 2022/23.
- For secondary schools, the MPF level will be £5,715 per pupil from 2023/24 compared to £5,415 per pupil in 2022/23.

Members are reminded that the MPF levels are not the same as the Age Weighted Pupil Unit (AWPU) or the basic pupil element in your school funding. AWPU is the rate set to allocate the basic entitlement of funding for pre-16 pupils in mainstream schools that is provided for all pupils. This is then supplemented by other formula factors based on the characteristics of your pupils and the school, including your lump sum allocation. The MPF funding ensures that schools receive a minimum level of funding calculated by dividing all your pupil led factors plus the lump sum allocation by the number of pupils on roll. This calculation excludes other factors, for example rates.

Schools Business Rates

Further to the DfE announcements following consultation on changes to the payment process of schools business rates revised arrangements were introduced on some LAs in 2022/23. However, the historic arrangements continued to apply in Lancashire, and at this point, schools business rates we expect the existing rates arrangements to continue in 2023/24.

DfE have indicated that they have asked local authorities to confirm by January 2023 the payment process they will be implementing for April 2023. In 2 tier local authority areas (like Lancashire), all billing authorities need to agree to implement the National Non Domestic Rates (NNDR) changes before they are introduced and if mutual consent is not reached it will not be possible for any billing authority to adopt the revised payment process.

Local Schools Block Formula 2023/24

Even though Lancashire has adopted the national funding formula methodology as the local funding formula, a degree of local discretion remains about the schools block arrangements in 2023/24. Further information is provided below.

Minimum Funding Guarantee (MFG)

For 2023/24, during the transition to the direct NFF, there remains local discretion around the level of Minimum Funding Guarantee (MFG). LAs have the freedom to set the MFG in local formulae between +0.0% and +0.5% 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 2022. The LA proposal included in the consultation will be for the MFG to be set at +0.5% in 2023/24, as this provides the maximum allowable protection for Lancashire schools and academies and matches the funding floor protection included in the NFF.

Notional SEN

Local authorities are required to identify a notional budget for their mainstream schools which helps them comply with their duty to use their 'best endeavours' to meet the special educational needs (SEN) of their pupils. **The notional SEN budget is not a separate budget or funding allocation** but is identified within a maintained school's delegated budget share, or an academy's general annual grant, and is calculated by each LA using their local mainstream schools funding formula factors.

The DfE's 2023/24 operational guidance emphasised that LAs should keep their notional SEN budget under review to make sure that their schools' notional SEN budget is a realistic amount for meeting the costs of additional SEN support up to £6,000 per pupil, and that any shortfall in this notional budget can be appropriately met from additional high needs targeted funding. High needs top-up funding is allocated in addition to the notional SEN budget for SEN support costs in excess of £6,000 per pupil.

Alongside the operational guidance for 2023/24, the DfE have published additional information about notional SEN. This information confirms that there is currently no national approach to the calculation of schools' notional budget for pupils with SEN through the NFF. The guidance does provide data about the notional SEN calculations nationally. It notes that most LAs calculate their schools' notional SEN budget using a combination of funding from the basic entitlement factor, the deprivation factors, and the low prior attainment factors in the local funding formula.

DfE indicates that the overall percentage of formula allocations which are designated as the notional SEN budget across all local authorities is 11.3% in 2021 to 2022. The median notional SEN allocation is 10.8%.

In order to assist consideration of the notional SEN budget, the DfE have made available data about the national position from analysis of LAs schools block funding formulae 2022 to 2023, as shown below:

Notional SEN % in formulae	Count of LAs	% of LAs
0% to 5%	9	6%
5% to 7.5%	22	14%
7.5% to 10%	35	23%
10% to 12.5%	38	25%
12.5% to 15%	24	16%
15% to 17.5%	16	11%
17.5% to 20%	5	3%
Above 20%	3	2%
All	152	100%

Lancashire's notional SEN figure in 2022/23 equates to 17.3%.

The national data also provides details of the main factors used to determine schools' notional SEN budgets. The table below shows the number of LAs for which each main factor is being used to determine schools' notional SEN budgets in the 2022 to 2023 formulae and also indicates if it used in the Lancashire calculation

Factor	Count of LAs using factor in 2022 to 2023 calculation	Lancashire
Basic entitlement	138	No
Deprivation	152	Yes
English as an additional language	100	Yes
Looked-after children	9	No
Prior attainment	148	Yes
Mobility	96	Yes
Lump sum	95	No
Sparsity	3	No
MPPF	14	Yes
MFG	10	No

Members will recall that the Lancashire notional SEN calculation was reviewed ahead of the 2020/21 financial year, and following a consultation with schools, the Forum supported the introduction of a simplified notional SEN calculation from April 2020.

The revised methodology, which remains applicable in 2022/23 is shown below

- 100% of Prior Attainment ;
- 100% of EAL;
- 100% of FSM;
- 100% of FSM Ever 6;
- 100% of IDACI;

After reviewing the Lancashire position ahead of FY 2023/24, the LA is not proposing any amendment to notional SEN methodology from April 2023. This is because:

- The Lancashire calculation has been subject to a recent review and consultation with schools;
- The DfE benchmarking shows that Lancashire's calculation is identifying a notional SEN figure at the higher end of the range nationally;
- Due to various staffing changes within the school funding team at the county council, it is judged best to minimise any changes to the funding arrangements
- It seems likely that the DfE will in future issue national guidance about notional SEN calculations as part of a direct NFF.

The Working Group are asked to consider this position and support the proposal to retain the current notional SEN calculation for the 2023/24 financial year.

The LA will keep the notional SEN calculation under review in future years, especially in the light of any national guidance from the DfE.

Exceptional Circumstances Factor

The 2023/24 Schools Block Operational Guidance continues to allow for an exceptional circumstances factor to be included in the formula. The exceptional circumstances factor must relate to premises costs and is only applicable where the value of the factor is more than 1% of a school's budget and applies to fewer than 5% of the schools in the local authority's area.

This factor has been utilised by Lancashire for a number of years and in 2022/23 supported 3 schools for a 'rents' payment where the schools needed to rent premises to deliver the curriculum.

Guidance for 2023/24 specifies that where LAs have already received approval for exceptional circumstances from 2018 to 2019 onwards, they can continue to use the approved factors if the criteria are still being met. Where the latest approval was prior to 2018 to 2019 the local authority will need to submit a new disapplication request for consideration.

In Lancashire's circumstances a new disapplication request will need to be submitted.

The 3 schools involved will continue to rent premises in 2023/24 and initial modelling indicates that the criteria for the value of the factor to be more than 1% of a school's budget and applicable to fewer than 5% of the schools in the area are still met.

The disapplication deadline to submit applications for exceptional circumstances is 10 October 2022.

The Working Group is asked to support the disapplication to the DfE to request the continued use of an Exceptional Factor in the Lancashire formula, to provide allocations to 3 schools to cover the costs of renting premises for the schools

At the Schools Forum on 18 October members will be asked to formally vote on supporting the submission of disapplication request to the DfE, as this will form part of the disapplication request.

Dedicated schools grant (DSG) transfers

Local authorities continue to be able to transfer up to 0.5% of their schools block to other blocks of the DSG, with schools forum approval.

Any DSG underspend brought forward from the previous year can be used to support the growth or falling rolls fund in the schools block, the central school services block, the high needs block, or the early years block.

In 2020/21 and 2021/22, following consultation with schools and academies, the Forum agreed to transfer Schools Block headroom to support pressures in the Early Years Block. This transfer equated to £2m in each year. In 2022/23, no transfer was possible, as there was no headroom available in the schools block. Further local modelling will be needed to assess the 2023/24 position, but at this point it is not expected that headroom will be at available at levels that were accessible in 2020/21 and 2021/22.

If required, an urgent consultation about any possible Schools Block transfer will be held with schools and academies once final 2023/24 DSG allocations are received from DfE and have been assessed.

Deficit management

The DfE recognises that there may well be some local authorities which, despite their best efforts and the increased funding for the high needs block, will still not be able to pay off their historic deficit from the DSG over the next few years. In these cases, the department expects to work together with the local authority to agree a plan of action to enable the local authority to pay off its deficit over time.

To date, Lancashire has managed to maintain a surplus DSG reserve.

ESFA continues to provide support and guidance nationally to LAs with highest historic deficits.

Central School Services Block (CSSB)

As members are aware, the Central School Services Block (CSSB) is made up from a formulaic 'ongoing responsibilities' element that relates to responsibilities that local authorities continue to have for all schools, and a 'historic commitments' element that relates to certain commitments entered into before April 2013.

The total funding for the current responsibilities is £292 million in 2023/24. This funds all local authorities for functions that they have a statutory obligation to perform for all students in the schools and academies they maintain.

For 2023/24, the per pupil rate used in the formulaic ongoing responsibilities calculation will receive an uplift similar to the Schools Block, but the historic commitments funding will continue to decrease, by a further 20% from April 2022.

Provisional Allocations for 2023/24

Government NFF announcements in July 2022 were accompanied by provisional data on the allocations LAs will receive for 2023/24 and notional allocations at individual school level. The data is available [here](#) and contains all primary and secondary schools and academies nationally.

It must be noted that the provisional allocations are calculated using pupil numbers from the October 2021 census. Final allocations, to be issued to schools in February 2023, will be based on pupil numbers from the October 2022 school census.

Even though schools are guaranteed an increase in funding per pupil for their pupil-led funding in the NFF in 2023/24, allocations may still reduce at an individual school level if a school has fewer pupils than before.

Lancashire Position

The July 2022 government announcements contain the actual units of funding for primary and secondary schools that will be used to calculate the 2023/24 Schools Block allocations. Information for Lancashire is provided below, including 2022/23 SUF and PUF values for comparison:

Unit of Funding	2022/23	2023/24
Actual primary unit of funding (PUF)	£4,697	£4,931
Actual secondary unit of funding (SUF)	£5,891	£6,214

Announcements also contained provisional 2023/24 allocations for all DSG funding blocks, except early years. The Lancashire information is provided in the table below and it should be noted that the early years block figures for 2022/23 have been replicated for 2023/24 to complete the 2023/24 DSG estimate. The baseline figures also incorporate schools supplementary grant allocations, which were issued as a separate grant in 2022/23.

Forecast DSG Income	2022/2023 Baseline £m's	DfE notional 2023/24 allocation (using Oct 20 data) £m's	Difference £m's	Difference %
Schools Block	899.471	917.412	17.941	2%
High Needs Block	172.44	183.029	10.589	6%
Early Years Block (NOT UPDATED)	82.472	82.472	0	0%
CSSB	6.8384	6.7962	-0.042	-1%
Total	1,161.221	1,189.709	28.488	3%

The current forecast shows an total increase of circa 2% in the Schools Block from April 2022, however, it must be remembered that actual DSG allocations in Lancashire, to be published in December 2022, could be lower than those in the provisional notification from the DfE, dependant on pupil data from the October 2022 school census.

The Schools Block figures are also shown without the Growth Fund allocations, as these are calculated outside the NFF methodology, although it should be noted that the DfE NFF consultation referred to elsewhere on the agenda starts to develop possible proposals on this subject.

The Schools Block funding increase is welcomed, but members will be aware that there are considerable costs pressures currently facing the sector, with staff costs, energy and general inflation all increasing significantly above this level.

The High Needs Block is forecast to increase by circa 6% for 2023/24.

In HNB, demand growth over the last few years has been circa £10million per year and inflationary pressures will only add to the cost increases for the sector going forward. There is therefore expected to be considerable strain on the HNB in 2023/24.

The reduction of the 20% in the CSSB historic spend element in 2023/24 is largely offset by the increase in the ongoing responsibilities funding, leaving the CSSB facing a marginal decrease from April 2023.

Members will recall that the Forum has made arrangements to mitigate the loss of historic commitments funding by ceasing to support some services and transferring other support to the HNB.

Recommendations

The Working Group:

- a) Noted the report and that the final allocation for 2023/24 would be notified in December 2022.
- b) Noted that consultation responses on the level of MFG would be presented to the Forum meeting on 18 October 2022 and that the Forum would be asked to formally consider the 2023/24 rate.
- c) Supported the proposal to retain the current notional SEN calculation for the 2023/24 financial year.
- a) Supported the proposed voting arrangements as set out for consideration of the MFG proposals.
- b) Supported the disapplication to the DfE to request the continued use of an Exceptional Factor in the Lancashire formula, to provide allocations to 3 schools to cover the costs of renting premises for the schools.

2. Inclusion Hub Report

To consider the update from the Inclusion Hubs.

The Working Group:

- a) Suggested for Inclusion Services to attend future School Forum meeting
- b) Noted that the Inclusion report should be made available in due course.

After the meeting, copies of the report were circulated to members. It was noted that the report did not have accurate information, therefore Inclusion Services will be working on the second version, which will be provided to School Forum on 18 October 2022.

3. Service De-delegations 2023/24

Each year, the primary and secondary school members of the Schools Forum must decide on Service De-delegation proposals put forward by the Authority. Where appropriate, agreed de-delegations are then offered to nursery schools, special schools and PRUs as group buy-backs.

At the July 2022 working group meeting, initial proposals for 2023/24 de-delegations were presented for consideration. Proposals included a continuation of the 4 service de-delegations that had been approved by the Forum for 2022/23, which were:

- Staff costs – Public Duties/Suspensions
- Heritage Learning Service - Primary Schools Only
- Support for Schools in Financial Difficulty
- Inclusion Hubs - Primary Schools Only

The consultation also proposed the de-delegation of an additional service in 2023/24, relating School Improvement Functions. Tim Roger has attended the meeting to provide information about School Improvement Functions.

The working group supported the 4 services being included in annual de-delegation consultation with schools. The proposals included the amended charging structure for the Staff costs – Public Duties/Suspensions and Support for Schools in Financial Difficulty de-delegations which ceased the use of a lump sum element in the charging methodology for these 2 services and has moved to a purely number on roll (NOR) based calculation in order to offer more equitable arrangements for smaller schools. To minimise turbulence, the lump sum element was reduced by 50% only as per Forum recommendation for 2022/23, with the corresponding increase in NOR rates. Colleagues will recall that the charges in 2022/23 were set at a transitional rate with the lump sum reducing from the historic level.

Proposals for the Heritage Learning Service and Inclusion Hubs de-delegations are being held charges at the 2022/23 levels.

At the time of the working group, the de-delegation consultation papers had not yet been approved for publication, but it was agreed to circulate the papers to members once they were cleared.

The closing date for consultation responses is 14 October 2022 and a final analysis and comments will be provided to the Schools Forum meeting on 18 October 2022 when maintained primary and secondary schools members will be asked to formally vote on the 2023/24 de-delegation proposals.

The working group supported the operation of the de-delegation voting at the Forum, which would take place at the meeting.

The Working Group:

- 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 18 October 2022 and that the Forum would be asked to formally consider de-delegation decisions for 2023/24.**
- d) Supported the proposed de-delegation voting arrangements.**

Subsequent to the meeting, copies of the 2023/24 service de-delegations and schools block funding formula full consultation document and the summary document were circulated to members and copies are attached to this report as Appendix A and Appendix B.

Analysis and comments from the consultation responses will be presented to the

Forum meeting on 18 October 2022.

4. Clawback Exemption Request

In July 2022, the Forum considered the School Balances and Clawback Policy for 2022/23 and agreed that clawback should be reintroduced on excessive revenue balances at March 2023.

The agreed policy is

School Balances and Clawback Guidance 2022/23

This guidance applies to school balances at 31 March 2023

Guideline Balances

The Authority's current maximum guideline balance is:

- 12% of Consistent Financial reporting (CFR) income for all phases of maintained school *(It is suggested that the 12% guideline figure is not seen as a target);*
- A £75,000 minimum balance threshold will be applied. *(This has been increased from £60,000 for 2022/23 taking into account inflation over the years since the last time that the minimum value was raised. This will provide smaller schools with a larger level of allowable balance as a protection against future costs pressures).*

Clawback of "excess balances"

The Authority's clawback arrangements are:

- 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). ;

Clawback Exemption Requests 2022/23

Following notification of the Forum's decision, requests has been received from 2 Lancashire secondary schools requesting exception to the policy at March 2023.

Request (1)

The school in question has saved funds for artificial pitch (MUGA), which impacts on its ability to deliver a full curriculum offer in PE. Funds have been saved for the artificial pitch to be installed on site, but installation is being delayed due to planning permission not yet being granted. The actual expenditure for the artificial pitch with these delays will fall into 2023/24.

The school has struggled to find suitable outdoor playing space to support both curricular and non-curricular activities as the playing field has very little drainage and is unusable for most of the year. The proximity of a tidal waterway running around the site leads to a high-water table at certain points of the year which adds to the problem.

In preparation for the potential costs, the school have managed to save a significant amount of money for the project. The school is requesting Forum to consider exempting £225,000 from clawback at the end of the financial year so that the funding can be utilised to fund the artificial pitch to provide curricular and non-curricular activities to its students in 2023/24 in response to the ongoing issue with site drainage.

Request (2)

Second secondary school in question has accumulated a Capital of 390,000. They are currently approaching on completing one project but planning to start second project before end of the year. This project was delayed due to a few factors and not have started by the 31st of March due, one of which is the limited times that capital works can be completed. The worst case could be that school would have £290,000 ring fenced for capital works that will not be completed as at 31st of March 2023. Details of the projects are provided below.

Development of the old site supervisors house to a business and conference centre

There is no designated meeting space within school whatsoever – every room has been utilised for curriculum use, including former meeting spaces which are now intervention rooms. So the meeting spaces have been re-allocated to curriculum use.

The former meeting spaces were not appropriate for parental meetings because they were all placed within the main building of the school, so parents were moving around the corridors at the same time as pupils and could easily walk into any classroom if they were determined to. Meetings that were contentious and sometimes became heated were less private than they should be, because of the position of the meeting space.

Consequently, we need to create appropriate and safe meeting spaces that allow us to engage with parents and professionals whilst keeping our pupils safe. The refurbishment of the house allows us to do this. Parents and professionals will not enter the main school building at all, they will be accommodated in the house only, which means that they will never cross paths with our pupils, thereby enhancing our ability to safeguard pupils during the school day.

So the refurbishment of the house will allow us to engage meaningfully with parents and professionals, a critical element of our work as we seek to improve attendance, re-engage pupils and parents who have disengaged with us and facilitate the growing number of professionals who are involved on a regular basis in private/confidential meetings with our pupils.

Curriculum benefit for redevelopment of our HE classroom :

Our Home Economics room is barely fit for purpose. It is our only specialist food technology room and has insufficient workstations/cookers/hobs for the class sizes we now must

accommodate. Additionally, the room is the original room from when the school was built so is some 30 years old. Pupils are working in a room that has a poor layout, inadequate equipment and insufficient capacity to expand using the current gas and electrical infrastructure. Refurbishing this classroom is a priority, since pupils cannot cook in any other room in the school. To not refurbish the room would result in a narrowing of the curriculum, meaning school would not be delivering the full breadth and balance of Technology that the National Curriculum requires.

Science Learning Partnerships

In addition, the School holds a Science Learning Partnerships contract for Lancashire and Cumbria. They maintained this contract for many years and the current agreement is valid from 1 April 2022 for 17 months until 31 August 2023. This partnership is related to STEM learning and is ultimately funded by the DfE. Significant balances are often held at the end of the year, for example as of 31.03.22 £200,000 was in their bank account for this contract.

The Working Group:

- a) Noted the report.**
- b) Supported clawback exemptions for 2022/23 to be taken as a recommendation to the School Forum meeting.**

Consultation on the Schools Block Funding Arrangements and Service De-delegations 2023/24

Summary Document

Summary

- The Government made various announcements in July 2022 about school funding for 2023/24. These announcements confirmed that the DfE have made limited changes to the funding arrangements from April 2023 and confirmed that de-delegation arrangements continue to be allowable from April 2023.
- This consultation is seeking views about the continuation of services de-delegations in 2023/24, and one supplementary which are:
 - Staff costs – Public Duties/Suspensions – Proposals are similar to 2022/23, but proposals look to remove the lump sum element that was historically included in the charge.
 - Heritage Learning Service (Museum Service) - Primary Schools Only – Proposals are similar to 2022/23 and charges are held at the same level.
 - Support for Schools in Financial Difficulty – Arrangements are similar to 2022/23 but also includes proposals to remove the lump sum element that was historically included in the charge.
 - Primary Inclusion Hubs – Proposals are similar to 2022/23 and the charge remains as per the current year.
 - School improvement functions – Proposal for 2023/24 to provide a wide range of services to schools and work in partnership with, primary and secondary schools. The work focuses on every child having a quality education from 0-18 years old and support to improve their functions.
- It is extremely important to the County Council and the Schools Forum to be able to reflect the views of Lancashire schools when making decisions about de-delegation arrangements for 2023/24, as these decisions are binding on all primary and secondary schools.
- De-delegations are not permitted for academies, special schools, nursery schools or PRUs, however, some services will be offered as a buy-back and separate information will be provided about these options, where appropriate.
- Following a previous consultation with schools and the Schools Forum, Lancashire has adopted the NFF methodology as the local funding formula. The main document also sets out the main formula changes that will be introduced for 2023/24 and seeks views on the level of Minimum Funding Guarantee (MFG) that should be applied in Lancashire from April 2023.
- Please let us know your views on the de-delegations proposals for 2023/24, by completing the consultation questionnaire available [here](#), by **14 October 2022**.
- If there are any proposals to transfer funding from Schools Block to other funding blocks in 2023/24 that emerge once we have modelled allocations from the DfE on the schools funding arrangements, further consultation will be issued seeking schools' views.

Consultation on the Schools Block Funding Arrangements and Service De-delegations 2023/24

Executive Summary

The Government made various announcements in July 2022 about school funding for 2023/24. These announcements confirmed that the DfE has made limited changes to the funding arrangements from April 2023.

This means that the 'soft' National School Funding Formula (NFF) arrangements will continue for 2023/24, where the allocations for each Local Authority (LA) are calculated on the aggregated individual school National Funding Formula (NFF) amounts, but the LA's local formula still applies in making actual allocations to primary and secondary schools.

The soft NFF arrangements will allow the continuation of de-delegation arrangements in 2023/24, subject to consultation with primary and secondary schools and approval of the Schools Forum.

This consultation is seeking views about the continuation of services de-delegations in 2023/24, which are:

- Staff costs – Public Duties/Suspensions;
- Heritage Learning Service (Museum Service) - Primary Schools Only;
- Support for Schools in Financial Difficulty;
- Primary Inclusion Hubs.
- Support for Education Improvement

The main change from 2022/23 relates to the charging methodology for the Staff Costs and Schools in Financial Difficulty de-delegations, where proposals look to remove the lump sum element that was historically included in the charge.

It is extremely important to the County Council and the Schools Forum to be able to reflect the views of Lancashire schools when making decisions about de-delegation arrangements for 2023/24, as these decisions are binding on all primary and secondary schools.

De-delegations are not permitted for academies, special schools, nursery schools or PRUs, however, some services will be offered as a buy-back and separate information will be provided about these options, where appropriate.

Please let us know your views on the de-delegations proposals for 2023/24, by completing the consultation questionnaire available [here](#), by **14 October 2022**.

Following a previous consultation with schools and the Schools Forum, Lancashire has adopted the NFF methodology as the local funding formula. This document also sets out the main formula changes that will be introduced for 2023/24 and seeks views on the level of Minimum Funding Guarantee (MFG) that should be applied in Lancashire from April 2023.

If there are any proposals to transfer funding from Schools Block to other funding blocks in 2023/24 that emerge once we have modelled allocations from the DfE on the schools funding arrangements, further consultation will be issued seeking schools' views

PART A 2023/24 DE-DELEGATION PROPOSALS

The school funding framework continues to allow service de-delegations in 2023/24. As per the funding arrangements in recent years, de-delegated services must be allocated through the formula but can be de-delegated for maintained mainstream primary and secondary schools, subject to consultation with schools and with Schools Forum approval.

De-delegations apply to a limited range of services where central provision for maintained schools (but not academies) may be argued for on the grounds of economies of scale or pooled risk. These services and their funding are delegated to schools and academies in the first instance, however if maintained primary and secondary schools if a phase agree, via a majority vote through the Schools Forum, the services can be provided centrally by returning the funding to the Local Authority. The final net delegated budget available to each school would then exclude these amounts.

For 2022/23, the Schools Forum approved a number of de-delegations, following consultation with schools. However, service de-delegations must be approved on an annual basis and this consultation document sets out proposals for 2023/24 and seeks your views.

Proposals for 2023/24 involve the 4 services that were approved by the Forum in 2022/23, plus an additional service which are:

- Staff costs – Public Duties/Suspensions;
- Heritage Learning Service (Museum Service) - Primary Schools Only;
- Support for Schools in Financial Difficulty;
- Primary Inclusion Hubs - Primary Schools Only
- School Improvement Functions

One key issue that is different for the 2023/24 proposals for the Staff Costs and the Support for Schools in Financial Difficulty de-delegations relates to the charging methodology.

The de-delegation charges for these 2 services have historically utilised a per pupil rate plus a lump sum.

The Schools Forum have previously raised concerns that a greater proportion of small primary schools are identified in the higher risk categories using the County Council's Schools in Financial Difficulty (SIFD) categorisation. It may be argued that lump sum charges disadvantage smaller schools, as the lump sum element is the same regardless of the size of school or its budget. Per pupil only charges are more reflective of different sizes of school and also to any year on year changes in pupil numbers, which impact on the revenue funding each school receives.

The Forum have therefore recommended that these services move to Number on Roll (NOR) only charging methodologies for 2023/24. Colleagues will recall that the charges in 2022/23 were set at a transitional rate with the lump sum reducing from the historic level.

Further details of the impact of these changes is provided in the relevant sections below.

This consultation document also provides information on all the proposed de-delegation service offers and charging structures from April 2023, and possible service options where

these are available. Supplementary information providing additional details around the proposals are included in various appendices and annexes.

Decision taken by the primary and secondary school members of the Schools Forum will be binding on all schools in that phase, so it is important that members are aware of the views of schools when they are making the de-delegation decisions.

De-delegations are not permitted for academies, special schools, nursery schools or PRUs, however, some services will be offered as a buy-back arrangement and separate information will be provided about these options where appropriate.

1. Staff costs – Public Duties/Suspensions

The 2022/23 de-delegation consultation presented a number of Staff Costs options, particularly around the trade union duties following a review of the Trade Union Facilities Time Agreement.

In accordance with the most popular option from school responses, the Forum agreed to support the 2022/23 staff costs de-delegation at the level of service provided in previous years.

For the 2023/24 consultation, various options are again presented for consideration by schools and information on the different possibilities are included below and in the appendices.

Background information, which was shared with the Schools Forum in summer term 2022, provided an update about the Trade Union Facilities Agreement and a copy of this report is attached at [Appendix A](#). The report includes information about the historical position of the facilities time agreement, the legal requirements, recent union amalgamations and number of school staff supported from the de-delegation and how this has changed in recent years.

Further Information from Trade Unions

In response to the consideration of the de-delegation options for 2023/24 trade union colleagues have submitted further information setting out their positions on the facilities time issue and the advantages the agreement provides.

The teacher trade unions have produced two joint papers. The first is a paper titled 'In Defence of Pooled Facility Time' and provides a summary of the legal context and some practical advantages of the current system from the unions' perspective. This paper is attached at [Appendix B](#).

A second document on behalf of the teacher unions is a position paper that sets out the union's view about the benefits of the facilities time agreement in more detail, including some possible costings at school level if the agreement were not in place. This document is attached at [Appendix C](#).

[Appendix D](#) is a paper from Unison setting out their position, which makes representations about the balance of support provided through the facilities time agreement should be reviewed to be based on membership numbers in Lancashire schools, which would suggest

that a greater share of the funding should be allocated to Unison. The Unison submission also includes information in support of the general benefits of facility time and the shared funding of facility time.

2023/24 De-delegation Options

Having considered the information provided, the options available for this de-delegation in 2023/24 are:

- a) Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation using the same policy as 2022/23
- b) Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation but with a reduced Trade Union Facilities Time contribution to reflect a smaller workforce;
- c) Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation but without any Trade Union Facilities Time contribution;
- d) Completely discontinue the 'Staff Costs - Public Duties/Suspensions' de-delegation.

Further details on each of the options are provided in the following sections, which also includes the relevant adjustments to the de-delegation charges that are proposed for 2023/24 under each of the options.

a) Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation using the same policy as 2022/23

One option available in 2022/23 is to continue the existing de-delegation arrangements using the same policy as applied in 2022/23.

The 2022/23 'Staff Costs - Public Duties/Suspensions' de-delegation incorporated reimbursement to schools for staff costs associated with duties including:

- Magistrates/Justices of the Peace;
- Jury Service;
- Attendance at Court/Tribunal as a Witness;
- Teachers who are Governors of schools other than their own;
- Territorial Army/Royal Naval Reserve/Royal Air Force Reserve;
- Trade Union Duties under the County Council's Facilities Time Agreement.

- And, if a member of staff is suspended from duty.

The total 2022/23 de-delegation budget equated to circa £736k, including public duties, trade union duties and suspensions.

In order to respond to the 2022/23 overspend, and to transition away from the lump sum element of the charge by reducing it by 50% from April 2023 (with the equivalent increase in the per pupil element) the revised de-delegation rates for 2023/24 are shown below:

	Primary	Secondary
Rate per pupil	£ 5.34	£ 6.13

An impact assessment has been undertaken based on the implementation of the purely NOR based methodology and this is provided in the Schools in Financial Difficulty section below, as that de-delegation is also subject to proposals to move to a NOR only methodology and this allows the overall impact to be assessed.

It should be noted that as the de-delegation showed an overall underspend in 2021/22, the proposed 2023/24 charges have been calculated to generate the same level of income from the purely NOR methodology, but do not include any further uplift in the charging rate.

Advantages of this option

- The Facilities Agreement for teacher trade unions demonstrates the commitment that the schools and Schools Forum have towards fostering and maintaining good relations with employee representatives;
- Continuing the 'Staff Costs - Public Duties/Suspensions' de-delegation will assist in maintaining the very positive relationships with the trade unions when dealing with issues affecting staff in schools in addition to financially supporting schools for staff undertaking other public service duties;
- In the current financial climate in the school sector, with significant numbers of schools facing financial difficulties, the input from trade union representatives to assist with school reorganisation proposals will be in continued demand and it may be counterproductive to reduce the support available by decreasing the level of the de-delegation;
- This option minimises the risks financially and otherwise on individual schools of needing to provide time off for school based trade union representatives during working time to deal with casework in their own school and of bearing such costs, which would need to be met from individual schools budgets.

Disadvantages of this option

- The number of school staff covered by the de-delegation has reduced in recent years as the number of academies in Lancashire has increased, but this option does not reflect that change (figures are provided below in option b);
- Other options for the Staff Costs de-delegation reduce its costs, which would release some funding back to individual school budgets;

- It does not take into account Trade Union members paying fees and subscriptions to their associations that provide for Regional Officials to deal with very serious casework matters;
- From 1 April 2018, the County Council withdrew all funding for trade union representatives. From this date, workplace representatives have been required to undertake the role within their service areas, supported by regionally/nationally funded colleagues. The continuation of any Facilities Time Agreement funded by the de-delegation is not necessarily consistent with the County Council's decision.

b) Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation but with a reduced Trade Union Facilities Time contribution;

A second option for consideration proposes to continue the Staff Cost de-delegation in 2023/24, but to reduce the Trade Union Facilities Time contribution.

FTE teacher numbers in Lancashire in 1999, the year after Blackpool and Blackburn LAs went unitary, are broadly similar to those in 2010. Since 2011, the number of teachers covered by the Facilities Time Agreement has been affected as schools convert to academies.

Based on the most recent School Workforce data, the number of teaching staff in Lancashire schools is 10,206. Of these, 20% (2,070) are based in academies. When a school converts to become an academy, they are no longer able to draw on the Facilities Agreement funding, unless they arrange a separate buy-in arrangement. Despite this, there has been no equivalent reduction in the number of funded FTE trade union representatives.

This option proposes to reduce the financial contribution to support the Facilities Time Agreement in line with the % of staff now employed in academies (20%)

A UNISON post, which provides support for support staff in schools, is also funded from this de-delegation, and this proposal would require a reduction in their allocation equivalent to 20%.

In 2022/23, the trade union budget represented circa £472k of the total Staff Costs de-delegation. A realignment of the trade union costs element of the de-delegation would equate to the following school level savings in 2023/24 compared to the cost of maintaining the de-delegation at 2022/23 service levels, as set out in a) above. (Based on 2022/23 pupil numbers):

- £0.68 per pupil in primary schools;
- £0.79 per pupil in secondary schools.

Advantages of this option

- This option realigns the costs of the 2023/24 Facilities Time Agreement to one equivalent to that when the agreement was originally created in terms of teaching staff supported and reflects the number of staff now employed in academies that are no longer covered by the agreement;
- All parts of the school sector are facing considerable costs pressures and this proposal shares that burden with the unions benefitting from the de-delegation;
- A significant level of funding would still be provided for the Facilities Time Agreement, so the existing benefits of the de-delegation arrangements should, for the most part, be able to continue;
- A reduced amount of funding would be deducted from individual schools budgets, as set out above;
- Going forward, if de-delegations remain allowable, the level of contribution for the Facilities Time Agreement could perhaps be reviewed annually on the basis of any changes to the number of staff being supported and the budget position of Schools Forum;

Disadvantages of this option

- The level of funding released on a school by school basis is relatively small, and given that demand for union support in budget driven reorganisations is likely to increase as school funding gets tighter, it may be a better use of resources to leave the de-delegation at the 2022/23 level;
- Any decrease in the level of funding provided for the Facilities Time Agreement risks increasing demand on individual schools to provide time off for school based trade union representatives.

c) Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation but without any Trade Union Facilities Time contribution

Another option for consideration is to continue the Staff Costs de-delegation, but without the Facilities Time Agreement contribution.

This option would release circa £472k costs associated with the Facilities Time Agreement into individual school budgets. This would equate to the following school level savings in 2023/24 compared to the cost of maintaining the de-delegation at 2022/23 service levels, as set out in a) above. (Based on 2022/23 pupil numbers):

- £3.42 per pupil in primary schools;
- £3.93 per pupil in secondary schools

Advantages of this option

- This option would provide a more substantial level of funding to release into individual school budgets;

- It would mirror the decision taken by the County Council to withdraw funding for trade union representatives;
- Regional Trade Union officials would still be available to provide support with serious casework matters;
- The de-delegation would still provide insurance type cover to schools for other 'public duties and suspensions'.

Disadvantages of this option

- The relationships with Lancashire level trade union officials could be lost; as would considerable local knowledge and expertise that benefits employee relations in Lancashire schools;
- There would be greater demand on individual schools to provide time off for school based trade union representatives during working time to deal with casework in their own school, the costs of which would need to be met from individual schools budgets;
- Delays could be caused in resolving HR issues in schools, particularly where the school must rely on the availability of regional officials to manage HR casework;
- The occurrence of costs on individual schools would not be even, and schools facing the prospect of reorganisations due to budgetary constraints would face a higher risk that their budgeted resources would be needed to release staff to undertake trade union duties and activities.

d) Completely discontinue the 'Staff Costs - Public Duties/Suspensions' de-delegation

A final option for consideration would be to discontinue this de-delegation completely. This would mean that no staff costs de-delegation funding is collected from schools in 2023/24 and would equate to the following school level savings in 2023/24 compared to the cost of maintaining the de-delegation at 2022/23 service levels, as set out in a) above. (Based on 2022/23 pupil numbers):

- £6.13 per pupil in secondary schools;
- £5.34 per pupil in primary schools;

However, it is important to note that if this service is not de-delegated the County Council has no proposals to develop a traded service and schools would need to make their own arrangements.

Advantages of this option

- This option provides the largest saving against the 2022/23 de-delegation costs;
- In a given year, some schools do not benefit from this de-delegation, if they have no cause for trade union involvement, no staff undertaking public duties and do not suspend anyone from duty;

- This option also mirrors the decision taken by the County Council to withdraw funding for trade union representatives;
- Regional Trade Union officials would still be available to provide support with serious casework matters;

Disadvantages of this option

- The relationships with Lancashire level trade union officials would be lost; as would considerable local knowledge and expertise that benefits industrial relations in Lancashire schools;
- There would be greater demand on individual schools to provide time off for school based trade union representatives during working time to deal with casework in their own school, the costs of which would need to be met from individual schools budgets;
- Delays could be caused in resolving HR issues in schools, particularly where the school must rely on the availability of regional officials to manage HR casework;
- The occurrence of costs on individual schools would not be even, and schools facing the prospect of reorganisations due to budgetary constraints would face a higher risk that their budgeted resources would be needed to release staff to undertake trade union duties and activities;
- The 'insurance' type cover offering protection for individual school budgets from this de-delegation would be lost, and some schools risk considerable additional costs if they have staff who undertake significant levels of public duties or who are suspended.

Q1. What is your preferred de-delegation option for 'Staff Costs - Public Duties/Suspensions' in 2023/24?

- **Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation using the same policy as 2022/23;**
- **Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation but with a reduced Trade Union Facilities Time contribution to reflect academisations and union amalgamations;**
- **Continue the 'Staff Costs - Public Duties/Suspensions' de-delegation but without any Trade Union Facilities Time contribution;**
- **Completely discontinue the 'Staff Costs - Public Duties/Suspensions' de-delegation;**
- **Not Sure.**

Please note that charges quoted in this section may vary marginally, based on pupil numbers from the October 2022 school census.

2. Heritage Learning Team - Primary Schools Only

The Schools Forum have historically supported the work the Heritage Learning Team undertakes for primary schools to help meet the national curriculum and to support wider cultural learning and learning outside the classroom aims. With the emphasis being placed on cultural education by the government's Culture White Paper, it is proposed that this budget continues to be de-delegated in 2022/23 to ensure that this service is maintained.

The de-delegated budget is used by the Heritage Learning Team to pay for the creation, design, curriculum development and resourcing of the learning sessions provided across LCC's museums, schools outreach, Lancashire Archives and a range of partner museums across the county. Learning is therein offered both at the museums, cultural venues and as outreach into schools. The money also covers staff training for the freelancer delivery team and the on-going monitoring/evaluation of the quality standards. The funding also enables new sessions to be developed in response to fluid curriculum changes. Free monthly and whole school CPD events are offered to teachers at the Preston Conservations Studios or as sessions within school. The Heritage Learning Team also offer a free curriculum development service to help inspire and engage. The Heritage Learning Team holds five Sandford Awards for excellence in Heritage Education, recognising the high quality and relevance of the sessions it offers to schools. The service has also been able to offer long term projects to schools including music programmes 'Turns and Tunes' and 'The People Versus'. 'The Lancashire Schools Magic Fest' focussed on numeracy, literacy, self-confidence, creativity, and the now annual 'Lancashire Schools Storytelling Festival'. Developments for 2022/23 include new STEAM sessions at the Lancaster Maritime Museum and Clitheroe Castle Museum, a range of new special events, and new funded projects covering a range of cross curricular themes.

The Heritage Learning Team also deliver a range of digital learning opportunities- Our Niche Academy packages include Shakespeare, Storytelling, Explorers and WWI. The 'Whole Lot of History Podcast' provides entertaining and exciting pathways into various historical topics designed solely for young people. We also offer a range of video guides and activities through our YouTube Channel.

The schools' loans service offered by the Heritage Learning Team is a subscription scheme, the charges are kept to a minimum, covering delivery and collection of loans boxes. Support from the de-delegated money enables development and resourcing of new loans boxes in line with the curriculum and teacher requests. During the last academic year, this has included new resources linked to Prehistory, Anglo Saxons, WWI, Romans, Seaside, Vikings, and Explorers.

Schools will continue to receive a small charge for museum visits, but only to cover the cost of paying the freelance delivery staff. Continued de-delegation will mean current charges for school visits, outreach sessions and loans boxes will again be held during the coming academic year.

Due to museum transition the learning team have ensured Lancashire schools can still access high quality sessions at Helmsore and Queen Street mills, the Museum of Lancashire, Judges Lodgings and Fleetwood museum. The Heritage Learning Team work with a range of external educational associates as critical learning partner to bring the best of learning to schools. We are delighted to announce they will be delivering the learning provision at the Harris Museum and Art Gallery.

If delegated, this service would only allocate just under £2.00 per pupil. If a traded service were to be offered the central service would only remain viable if all schools entered into the arrangement. On this basis, the authority would suggest that if schools would wish to see the service continue, the primary school museums budget should be de-delegated.

The proposed cost of this de-delegation in 2023/24 is provided in the table below (based on 2022/23 pupil numbers)

Heritage Learning Team

	Primary	Secondary
	£	£
Rate per pupil	1.97	0.00
Lump sum	0.00	0.00
Total De-delegation	183,296	0

Q2. Do you support the de-delegation of funding for the Heritage Learning Team in 2023/24?

(Primary schools only)

- Yes;
- No;
- Not Sure.

3. Support For Schools In Financial Difficulty (SIFD)

Currently support for schools in financial difficulty is offered in a number of ways which include:

- Brokering school to school support with schools sharing expertise at various levels e.g. leadership, teaching, subject leadership, assessment, curriculum models;
- Providing teaching and learning support through teaching and learning consultants e.g. bespoke professional development for teachers;
- Providing financial management support for schools e.g. complex recovery plans;
- Providing HR and financial support to enable schools to reduce staffing;
- Providing one off financial support, via a bid to the schools forum to enable the school to develop a sustainable recovery plan.

There are occasions when schools do not have sufficient resources available to meet the needs of their pupils and in these cases the Schools in Difficulty fund provides schools with the resources to help them overcome the challenges they are facing. There are clear, published eligibility criteria for access to these funds and these are managed on behalf of Schools Forum by the School Improvement Challenge Board (SICB). The funds are provided in order to help schools to raise achievement and create sustainable improvements in the quality of provision.

The de-delegation also includes some Termination of Employment costs (formerly Premature Retirement Costs), which can be a useful mechanism to facilitate staffing reorganisations in schools, particularly when they are in financial difficulty.

Current evidence indicates that this approach is well received and highly valued by headteachers and governors. The partnership between schools and the local authority has also proved invaluable in helping schools to improve the quality of provision in a sustainable way.

It is important to note that if this service is not de-delegated, the County Council has no proposals to develop a buy-back service to support schools in financial difficulty and schools would need to make their own arrangements.

The proposed cost of this de-delegation in 2023/24, based on a continuation of existing provision, is provided in the table below (based on 2022/23 pupil numbers).

As with the Staff Costs de-delegation earlier, proposals for the Support for Schools in Financial Difficulty service in 2023/24 look to transition the charging methodology away from the lump sum element of the calculation and move to a purely NOR based methodology. As recommended by the Schools Forum, 2023/24 proposals below reduce the lump sum by 50% compared to 2022/23, with an associated increase in per pupil rates.

Support for Schools in Financial Difficulty

	Primary	Secondary
	£	£
Rate per pupil	8.39	12.64
Lump sum	500.00	500.00
Total De-delegation	1,011,888	515,408

An impact assessment has been undertaken based on the implementation of the purely NOR based methodology for this, and the 'Staff Costs' de-delegation and examples based around differing school sizes in both the primary and secondary phases are provided below:

Primary	Staff Costs Public Duties and Suspensions	Support for Schools in Financial Difficulty	Total
Number of Pupils	No Lump Sum	No Lump Sum	No Lump Sum
50	£169	£376	£545
100	£113	£252	£365
210	-£9	-£21	-£31
315	-£127	-£282	-£408
420	-£245	-£545	-£790
630	-£473	-£1,051	-£1,524

Secondary	Staff Costs Public Duties and Suspensions	Support for Schools in Financial Difficulty	Total
Number of Pupils	No Lump Sum	No Lump Sum	No Lump Sum
500	£92	£205	£297
700	£37	£83	£120
900	-£11	-£25	-£37
1100	-£63	-£140	-£202
1300	-£116	-£259	-£375
1500	-£176	-£391	-£567

If the Support for Schools in Financial Difficulty de-delegation continues in 2024/25, it is anticipated that the charges would be calculated on a Number on Roll (NOR) only basis.

Q3. Do you support the de-delegation of Support for Schools in Financial Difficulty in 2023/24?

- Yes;
- No;
- Not Sure.

4. Primary Inclusion Hubs (Primary Schools only)

There is a shared vision in Lancashire to ensure children and young people achieve their potential, ambitions and aspirations. In order to achieve this we need to work together locally to ensure that schools are able to better meet the needs of all pupils.

It is proposed that the de-delegation allocations for 2023/24 continue to be calculated at individual school level on the basis of an amount per pupil and allocated to each district on the basis of pupil numbers and a deprivation factor (rather than a lump sum per district). This is to reflect the varying number of pupils being support in different districts.

The primary school Inclusion Hubs in each district are designed to:

- reduce the need for permanent exclusions;
- improve attendance of pupils;
- ensure that pupils' needs are better met by a 'local' offer;
- provide high quality training for staff in schools;

- share good practice and sign-post schools to expertise;
- develop an agreed set of principles within each district that promotes educational inclusion and reflects the local challenges and expertise;
- bring together schools and local authority teams (Social Care, Inclusion, School Improvement and the Children and Family Wellbeing Service) to work together to address particular issues in a locality.

The funding can be used in a range of ways to support inclusion, for example to provide staff training, advice and support packages and alternative provision.

Nominated headteacher members will report on the use of funding and impact to the Children and Young People's Partnership Board.

In the autumn term 2022, the Schools Forum received an update of the work of the Inclusion Hubs from the Inclusion Hubs.

The proposed cost of this de-delegation in 2023/24 is set out below, with the rate per pupil remaining unchanged for 2022/23.

Primary Inclusion Hubs

	Primary	Secondary
	£	£
Rate per pupil	11.00	0
Total De-delegation	1,000,000	0

Q4. Do you support the de-delegation of funding for Primary Inclusion Hubs in 2023/24?

- **Yes;**
- **No;**
- **Not Sure.**

5. School Improvement Functions

The Schools Forum is being asked to agree the proposal of de-delegation of funds for School Improvement Functions.

The School Improvement Team provide a wide range of services to schools and work in partnership with, primary and secondary schools. These teams provide a universal service of advice, support and challenge that is accessed by all; an enhanced package is also available for purchase as a School Service Guaranteed or School Level Agreement. The team supports all schools with Ofsted inspections by partnership work with staff and governors through SSG/SLA or MIT (Monitoring and Intervention Team), on a needs-based consultancy. In addition, during an inspection (Graded or Ungraded, or due to a qualifying

complaint) the advisers have discussions with inspectors to provide external validation of school evaluations. The team of advisers and consultants work with all schools irrespective of Ofsted judgement or financial situation to ensure all Lancashire children have the very best all-round education possible.

The Advisory Team work alongside schools and other teams (HR, finance, governors, service provider) on forming collaborations or federations. These arrangements secure the future of some schools by creating a stable leadership structure.

At a school level the support and challenge covers all aspects of school life; providing external validation of school judgements and decisions or opening up questions to challenge actions. The work focusses every child having a quality education from 0-18 years old and includes: reviews of quality of education; audits of leadership and management; curriculum development; training and awareness raising for governors and staff.

Schools are provided with a wealth of documents to support them in delivering a high-quality education to all pupils. These documents include summaries of key information (local and national) saving school leaders time and ensuring that they do not miss something vital. The advisers meet with Regional Schools' Commissioner and Senior HMI termly and can act as an interface with these government departments to represent school views and bring back key messages for schools and academies.

The Monitoring and Intervention Team (MIT) sit within the School Advisory Team but has a very specialist role which is not part of the traded SSG / SLA offer. The Local Authority has a statutory duty to promote high standards in schools and to intervene when Ofsted have placed a school into a category of concern. In Lancashire the remit has always extended further so that enhanced support and intervention can be accessed by schools judged by Ofsted as requiring improvement and, increasingly, as declining following an ungraded inspection; referral by the adviser; referral by the school. The Local Authority recognises the benefits of strong school-to-school support and brokers this to meet specific needs. However, there is often lack of capacity and expertise to manage more complex improvement requirements in this way; the MIT team provide an intensive and highly skilled package of monitoring and intervention, agreed via the School Improvement Challenge Board (SICB). Where a school is in financial difficulty this will be fully funded. The high proportion of Lancashire schools being graded good or better by Ofsted is, in part, testament to the vital work of this team.

If a school is at risk of being "less than good" based on self-evaluation, Local Authority evaluation or as judged by Ofsted then enhanced support is provided by the Monitoring and Intervention team of advisers and consultants. This is bespoke support that is provided immediately. The work of this team is both preventative and developmental.

The Ethnic Minority Team support all new arrival families with holistic support (health, children family wellbeing, special educational needs). Significantly this support facilitates language acquisition for children to promote school readiness at all ages and adult language too. The team respond 24 hours a day to critical incidents and works tirelessly with others to ensure the entire school/academy community is fully supported. The advisers invariably take the lead co-ordination role in such situations providing the key contact for media, health, emergency services, (e.g. school fire, death of a member of staff or pupil).

The proposed cost of this de-delegation in 2023/24 is provided in the table below (based on 2022/23 pupil numbers)

School Improvement Functions)

	Primary	Secondary
Rate per pupil	£ 14.00	£ 20.00
Total De-delegation	1,250,000	750,000

Q5. Do you support the de-delegation of funding for School Improvement Functions in 2023/24?

- **Yes;**
- **No;**
- **Not Sure.**

Responding to the consultation

It is extremely important to the County Council and the Schools Forum to be able to reflect the views of Lancashire schools when making decisions about de-delegation arrangements for 2022/23, as these decisions are binding on all primary and secondary schools.

Please let us know your views on the de-delegations proposals for 2023/24, by completing the consultation questionnaire available [here](#), **by 14 October 2022**, so that responses can be reported to the Schools Forum on 18 October 2022.

PART B 2023/24 SCHOOLS BLOCK FUNDING ARRANGEMENTS

In July 2022, the DfE made announcements about the 2023/24 school funding arrangements.

Overall, core schools funding (including funding for mainstream schools and high needs) is increasing by £1.5 billion in 2023/24 compared to the previous year.

National Funding Formula (NFF) 2023/24

The basic structure of the National Funding Formula (NFF) remains unchanged for 2023/24, but DfE have increased factor values and made some other changes to the arrangements. Further details are provided below:

Key changes to the schools NFF in 2023 to 2024 are:

- rolling the 2022 to 2023 schools supplementary grant into the NFF by:
 - adding an amount representing what schools receive through the grant into their baselines
 - adding the value of the lump sum, basic per pupil rates and free school meals Ever 6 (FSM6) parts of the grant onto the respective factors in the NFF
 - uplifting the minimum per pupil values by the supplementary grant's basic per-pupil values, and an additional amount which represents the average amount of funding schools receive from the FSM6 and lump sum parts of the grants
- increasing NFF factor values (on top of the amounts we have added for the schools supplementary grant) by:
 - 4.3% to free school meals at any time in the last 6 years (FSM6) and income deprivation affecting children index (IDACI). DfE say that this additional support directed to disadvantaged pupils, by increasing the FSM6 and IDACI factors in the schools NFF by a greater amount than other factors, means that a greater proportion of schools NFF will be targeted towards deprived pupils than ever before. 9.8% of the schools NFF will be allocated according to deprivation in 2023/24. 2.4% to the basic entitlement, low prior attainment (LPA), FSM, English as an additional language (EAL), mobility, and sparsity factors, and the lump sum.
 - 0.5% to the floor and the minimum per pupil levels (MPPL)
 - 0% on the premises factors, except for Private Finance Initiative (PFI) which has increased by Retail Prices Index excluding mortgage interest payments (RPIX) which is 11.2% for the year to April 2022

Minimum Pupil Funding

The DfE announcements included the relevant minimum pupil funding (MPF) levels for primary and secondary schools, which incorporate the 3.37% uplift for 2023/24:

- The primary schools, the MPF level will be £4,405 per pupil in 2023/24 compared to £4,265 per pupil in 2022/23.
- For secondary schools, the MPF level will be £5,715 per pupil from 2023/24 compared to £5,525 per pupil in 2022/23.

Local Schools Block Formula 2023/24

For 2023/24, during the transition to the direct NFF, some local discretion remains around the level of Minimum funding guarantee (MFG). LAs have the freedom to set the MFG in local formulae between +0.0% and +0.5% 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 2022. The LA proposal included in the consultation will be for the MFG to be set at +0.5% in 2023/24, as this provides the maximum allowable protection for Lancashire schools and academies and matches the funding floor protection included in the NFF.

Please remember whilst the MFG will offer protection for per pupil funding levels between years, individual school budget allocations can still go down if your pupil numbers reduce.

Q5. Do you agree that the Minimum Funding Guarantee (MFG) level should be set at +0.5% in the Lancashire formula in 2023/24?

- Yes;
- No;
- Not Sure.

Please let us know your views on the de-delegations proposals for 2023/24, by completing the consultation questionnaire available [here](#), by **14 October 2022**, so that responses can be reported to the Schools Forum on 18 October 2022.

Schools Block Transfer to other funding blocks

In recent years, following consultations with schools, funding has been transferred from the schools block to help mitigate pressures in other funding blocks (High Needs and Early Years). If there are any proposals to transfer funding from Schools Block to other funding blocks in 2023/24 that emerge once we have modelled allocations from the DfE on the schools funding arrangements, a further consultation will be issued seeking schools' views.

REPORT TO SCHOOLS FORUM - TRADE UNION FACILITIES AGREEMENT (JUNE 2022)

The Facilities Agreement for teacher trade unions demonstrates the commitment that the Schools Forum and Council have towards fostering and maintaining good relations with employee representatives. As an Authority, we enjoy very positive relationships with the trade unions when dealing with issues affecting staff in schools.

Each year a report is submitted to Forum for consideration of the level of trade union facilities agreement funding, set in 1998 and which had remained at the same level, despite the fact that each year a number of teachers transfer from maintained schools into academy schools that are not covered by de-delegation decisions, including access to paid local trade union officials via the Facilities Agreement.

Since October 2018 and on an annual basis, Forum voted on the staff costs de-delegation and decided to continue the de-delegation at the existing levels. This had also been the option receiving the highest overall response from schools during the Forum consultation process.

However, Forum members agreed to keep the contribution level of the facilities time agreement under review, as some members had supported the option to reduce the level in line with the teacher numbers/union reorganisation adjustment. This report has been prepared to provide the current position and allow Forum members to re-consider this issue.

Historical position

The current level of funding was set in 1998, when Blackburn and Blackpool became unitary authorities and 25% of Lancashire teachers transferred out of Lancashire Authority. At this time, the number of FTE facilities posts was reduced from 15 to 12.

In approximately 2010, the Council took a decision to reduce the number of centrally funded UNISON representative posts by 2 FTE. At that time, due to the increasing numbers of support staff in schools and the fact that the Equal Pay and terms and conditions reviews were ongoing, Schools Forum agreed to fund one post for a schools UNISON officer. This arrangement has remained in place ever since.

Funding position

On an annual basis, schools are asked whether they wish to de-delegate funding for Public Services duties. The large majority of this budget funds facilities time equating to 12 Full Time Equivalent (FTE) teaching posts for the four main teaching unions – NAHT, ASCL, NASUWT and NEU, and the 1 FTE post for UNISON.

In addition to the representatives funded by the Schools Forum, many schools have workplace representatives who may deal with HR casework for their school. The cost of any

release for school representatives is met by the school budget and not by de-delegated funding.

Each trade union also has regional officials, funded by their association. Within Lancashire, regional officials deal with very serious casework matters, usually where a member's employment is at risk.

Contractual position

All LCC-funded trade union representatives retain the terms and conditions of employment associated with their substantive post, including their grading level, any contractual enhancements and access to the pension scheme that applied to their substantive post. There is not a single set rate for the role of trade union representative. The exception to this is those representatives that do not have a substantive school post and are therefore placed on casual contracts with the council. These representatives are paid at Main Pay Range 6 (£36,961 per annum) and have access to the Local Government Pension Scheme.

Current allocations

The current allocations to the teacher unions (from the 12 FTE) were determined as a result of membership numbers when the initial agreement was written in 1998, and were not changed following the amalgamation of NUT and ATL in 2017. These allocations are as follows:

Union	NAHT	ASCL	NEU	NASUWT	UNISON
No. of FTE representatives	1.6 FTE (13%)	1.2 FTE (10%)	6.0 FTE (50%)	3.2 FTE (27%)	1 FTE
Membership numbers*	608 (5%)	204 (2%)	6,480 (49%)	5,868 (45%)	5,886

* Membership numbers have been taken from historical reports over the period 2013-18

Each union determines how its allocation is split between its nominated representatives. Currently the representation is provided by 11 serving teachers, 11 retired teachers, 1 supply teacher and 1 member of support staff. 9 of the 24 representatives are currently engaged on facilities time for more than 50% of their working hours.

Based on the most recent School Workforce data, the number of teaching staff in Lancashire Schools is 10,206. Of these, 20% (2,070) are based in Academy (former maintained) schools. When a school converts to become an Academy, they are no longer able to draw on the Facilities Agreement funding, unless they arrange a separate buy-in arrangement. Despite this, there has been no equivalent reduction in the number of funded FTE trade union representatives.

Trade Union duties and activities

The legislation in relation to trade unions provides examples of Trade Union Duties and Trade Union Activities.

Trade Union Duties include:

- Providing advice and guidance to trade union members relating to recruitment and selection, discipline, grievance, capability and attendance issues, and terms and conditions of employment
- Formal and informal consultation and negotiation - this includes the County Union Secretaries forum
- Restructures, reorganisations and redundancy consultation
- Preparing for and representing trade union members at formal hearings

For representatives, Trade Union Activities may include:

- Branch, area or regional meetings of the union where the business of the union is under discussion;
- Meetings of official policy making bodies such as the executive committee or annual conference;
- Meeting full-time officials to discuss issues relevant to the workplace;

The legal position in relation to trade union duties and activities and whether representatives are entitled to be paid for them is outlined below.

Legal position

There is no statutory requirement to provide specific funding solely for trade union duties and activities. The law requires that individual schools allow reasonable time off for trade union representatives during working time to be released from their workplace to undertake trade union duties and activities. If this occurs, the school will be compliant with the Trade Union and Labour Relations (Consolidation) Act 1992.

An employer who permits union representatives time off for trade union duties must pay them for the time off. However there is no statutory requirement that union representatives be paid for time off taken on trade union activities.

In addition, employees can take reasonable time off to undertake the duties of a Union Learning Representative (ULR), provided that the union has given the employer notice in writing that the employee is a ULR. The functions for which time off as a ULR is allowed include analysing, arranging, promoting and undergoing training.

The *Conditions of Service for school teachers in England and Wales* (Burgundy Book) requires individual local authorities to negotiate locally on the maximum amount of leave with pay that can be permitted for carrying out trade union duties.

The Trade Union (Facility Time Publication Requirements) Regulations 2017 came into force on the 1 April 2017. These regulations placed a legislative requirement on relevant public sector employers to collate and publish on an annual basis:

- Number of employees who were relevant union officials during the relevant period
- The percentage of working time that employees who were relevant union officials spent on facility time
- The percentage of the total pay bill that is spent on facility time
- The time spent on paid trade union activities as a percentage of total paid facility time hours

Financial implications

The total annual budget provision for funding under the Trade Union Facilities Agreement amounts to £472,000 including oncosts. If a decision is taken to reduce the current level of funding, it would result in a saving to the Schools Forum. However, there may be indirect costs incurred by schools, as they may need to release their school-based representatives to undertake trade union activity within their school, and provide representation to fulfil the statutory obligations.

Approximately 13% of the total allocated funding was not used during the 2020-21 academic year. This equates to over 1.5 FTE (307.5 days).

County Council's position

With effect from 1 April 2018, the County Council withdrew all funding for trade union representatives. From this date, workplace representatives have been required to undertake the role within their service areas, supported by regionally/nationally funded colleagues.

HR implications

If Forum took a decision to reduce funding for the Facilities Agreement, then the serving teacher funded officers that would no longer be funded would return to their substantive posts in their schools. Any retired/supply teacher funded officers in that position would have their casual contracts brought to an end. The UNISON representative would return to their substantive role. It should be noted that some of the representatives have been away from a substantive teacher role for many years and therefore may require a period of re-introduction and/or training to enable them to transition back into a school-based role, in addition to being a workplace union representative.

Decision required

Forum are asked to consider whether the existing number of representatives (12 FTE) should be reviewed. Forum may wish to consider the fact that 20% of teachers now work in schools that do not fall under the facilities agreement, and that over 1.5 FTE facilities time was not used during the last academic year. This is despite the fact that overall HR casework statistics within the Schools HR Team remained high during the pandemic.

Appendix B



21st July 2022

In Defence of Pooled Facilities Time

Dear Colleagues

There are provisions within The Employment Provisions Act 1999, The Trade Union Relations (Consolidated) Act 1992 and The Safety Representatives and Safety Committees Regulations 1977 for the following:

- Paid time off for trade union representatives to accompany workers to disciplinary, capability, attendance or grievance hearings;
- Paid time off for trade union representatives to consult and negotiate with employer bodies;
- Paid time off for trade union health and safety representatives during working hours to carry out health and safety functions;
- Paid time off for trade union representatives to attend trade union training;
- Paid time off for trade union learning representatives to carry out relevant learning activities; and
- Paid time off for trade union representatives to carry out administrative trade union duties e.g., reading and disseminating union documentation.

This is a Legal Entitlement for the Recognized Trade Unions **ASCL, NAHT, NASUWT & NEU**

Currently, Lancashire Schools do not have to be separately billed by individual unions for these legal responsibilities to be fulfilled each time there is a problem or a consultation involving any, or all, of the four recognized unions.

The pooled arrangements in place, because of de-delegation of the monies involved, allows this to take place with no disruption and no extra work for individual schools.

The extra workload on individual schools would be significant if we moved away from pooled arrangements. Imagine the costs to a school that had to have all its union representatives (including, of course, headteacher representatives) trained to a level that would allow them to negotiate with the Local Authority on policies and would allow them to support their

members in that school with complaints and grievances. What would happen, for example, if two members of staff from the same union were involved in the same dispute? Where would the other union representative come from?

How many school representatives would want to take on the responsibility of defending a colleague when their employment or career progression was at risk? That would be an overwhelming responsibility.

The present arrangements also allow for experienced trade union representatives, who understand the local context, without necessarily working in the school, to resolve issues, often informally, before they impact on schools. Lancashire has significantly fewer employment tribunal cases than similar authorities because of the excellent working relationships between Schools' HR and the recognized Trade Unions.

It is especially pleasing to note that increasing numbers of academy chains and stand-alone academies are now buying into Facilities Time. Other academy chains have also indicated that they will buy into the Facilities Time Agreement from September, increasing the demand on recognized Trade Union representatives.

The Pooled Arrangements also support maternity leave and the release for public services, such as jury service and Councillor duties.

At this present and difficult time, effective negotiations and problem-solving would not have been possible without the excellent industrial working relationships between the recognized trade unions and the employers.

It is important to note that the continuing pandemic massively impacts Lancashire HR and trade union officers' workload. It is therefore imperative that facilities time is, at the very least, maintained at the current level.

Kind regards





2. POSITION PAPER ON BEHALF OF THE TEACHER TRADE UNIONS FOR LANCASHIRE SCHOOLS' FORUM ON THE FUNDING OF FACILITIES' TIME

1. INTRODUCTION

This paper provides detailed information about Facilities' Time for representatives from the teaching unions which we hope will serve as a reminder to those who currently pay into the facilities fund and persuade those who don't to reconsider their position, based on the huge benefits the system brings to schools. The Local Authority Facilities' Time Fund is currently collected by Lancashire Local Authority through the process of de-delegation by Schools' Forum for maintained schools and from Academies which decide to buy-in to the pooled arrangements rather than operate their own systems. This method of funding facility time for representatives is in place in all North West local authorities and is not only the most cost-effective method but also ensures smooth running of all employment related matters without delay and provides the foundation of professional, working relationships between employers and their employees' teacher trade unions.

This paper has been prepared following discussions at Schools' Forum meetings about future funding arrangements where further information has been requested. The current practice across the Local Authority enables schools to discharge their legal obligations in respect of release for trade union duties in a time-tested, practical and cost-effective way. It is also consistent with existing practice that is in place across the North West region.

2. THE LEGAL POSITION

Union representatives have had a statutory right to reasonable paid time off to carry out trade union duties since 1975, and most of the current provisions come under the Trade Unions and Labour Relations (Consolidation) Act 1992, introduced by the then Conservative government. Guidance on the practical application of these provisions is provided in the recently revised ACAS Code of Practice 'Time Off for Trade Union Duties and Activities'.

In Lancashire, local, elected trade union officials and representatives have used this legal entitlement to time off from their substantive posts to undertake trade union duties, including:

- negotiating with employers;
- resolving individual and collective casework;
- health and safety work; and
- training.

It is a legal requirement for all employers to provide a reasonable amount of time off with pay to undertake these very important trade union duties. It is not a question of whether an employer wishes to pay or not, but rather what the best mechanism is for employers to discharge this legal obligation.

3. THE BENEFITS OF FACILITIES TIME

Employers' organisations, including the CBI and NEOST, recognise the value of Facilities' Time and the work of trade union representatives using that Facilities' Time, estimating that for every £1 spent on Facilities' Time, the employer saves between £3 and £9 on reduced staff absence, informal early resolution of potential disputes, and avoidance of legal and industrial action (see Case Studies section later).

The Lancashire Facilities' Time arrangements have helped schools to save significant amounts of time and money through the pooled funding of Facilities' Time by de-delegation of school budgets money over the longer term. This is supported by a study carried out by the Department for Business, Enterprise and Regulatory Reform which found that:

- Dismissal rates are lower in unionised workplaces with union reps – this resulted in savings for employers related to recruitment costs of at least £107m per annum
- Workplace-related injuries are lower in unionised workplaces with union reps resulting in savings to employers of £126m-371m per annum.
- Employment tribunal cases are lower in unionised workplaces with union reps resulting in savings to government of £22m-£43m per annum.
-

Although the perception of employers is often that the trade unions exist simply to support employees who are under threat of a disciplinary procedure, many employees raise concerns in relation to whether their treatment by the employer is just and equitable. This is an area of employment relations over which the employer has significantly less control and if good employer/employee relations are not established and maintained, the employer can be surprised when the workforce expresses their discontent.

Employees who are dissatisfied with actions taken by their employer have the right, under Employment Law, to raise their concerns with their trade union and employer and this may be done individually, collectively or sometimes both. These concerns often relate to bullying and harassment, objections raised about restructuring proposals, claims of discrimination or that the employer has been negligent in their duty of care.

This report includes recently experienced case studies detailing an individual case of alleged discrimination, and a collective dispute case together with details of the costs that an employment tribunal awarded against one of the parties involved in another case.

These case studies show clearly that, in addition to the generally damaging issues for schools around the public arena that being taken to an Employment Tribunal represents, these situations can cost employers a great deal in time and money. The trade union representative has a vital role in working with the employer to achieve the best outcome and resolve issues as locally and informally as possible. This undoubtedly reduces the risks of litigation and is a benefit that assists all schools. We believe that the benefits of funding Facilities' Time centrally far outweigh the costs involved and are urging all schools and academies in Lancashire to make, or continue to make, this commitment in recognition of the universal benefits involved.

Although all unions employ regionally based staff to deal with high level cases, resolutions being found at the earliest opportunity are always the most beneficial to all parties. This is why supporting paid time off for local union representatives makes so much business sense. There would be no advantage to the employer in waiting for a paid official to become available every time a low-level negotiation needs to be carried out. Indeed, it is often a significant disadvantage because nothing can happen locally in the meantime and involving them prematurely tends to escalate any situation somewhat precipitously. Local union officers have a much better understanding of the schools in our area and can form positive working relationship with individual headteachers and key local authority officers such as the Schools' HR team.

Fortunately, in Lancashire, due to the tried and tested current Facilities' Time Agreement, the vast majority of cases are resolved at the informal, local level which prevents disputes escalating to the Employment Tribunal level, saving very significant amounts of time, money and stress for all concerned.

4. CASE STUDIES

Case Study 1 - Costs for a Discrimination Case in a North-West School

The North-West may be thought of as an area with few black and minority ethnic teachers and a relatively low level of equality issues on a more general level. However, experience has shown that the frequency of cases where these teachers feel that they suffer from discrimination is actually relatively high, particularly when assessed against the local demographics. Discrimination claims can include not only race discrimination but also discrimination on the grounds of faith or belief which can be quite wide ranging. The legislation also allows claims for alleged discrimination on grounds of sex, disability, sexuality and age, all of which may also be pursued as separately identified cases against a school. Employees can also pursue claims for victimisation where they have made a complaint of discrimination (whether internally or externally) and feel they received treatment that victimised them in response to that complaint.

Other key pieces of legislation that teachers pursue claims under include the Fixed Term Employee Regulations, the Part Time Worker Regulations, the Agency Worker Regulations, Unfair Dismissal and Unfair Selection for Redundancy. These are the commonest claims the trade unions generally handle for teachers, although there are other heads of law that could be relied upon.

This case study demonstrates the costs associated with a case where a teacher in a North-West school believed that he was being discriminated against on grounds of race and disability. This teacher raised the issue of race discrimination with the school but was not satisfied with the way in which his complaint was handled or resolved. This led to extreme stress and anxiety which after a period of time manifested itself in physical illness diagnosed as severe and chronic irritable bowel syndrome and severe migraines. This teacher was then off sick for a considerable length of time resulting in the school commencing procedures to dismiss the teacher on grounds of ill health. This teacher was convinced that his illness was caused by the racial discrimination he experienced in his workplace and intended to take a claim for unfair dismissal and discrimination on the grounds of race and disability to employment tribunal. There was medical evidence to support this view for legal purposes. The case was eventually settled by way of a compromise agreement after more than 18 months of meetings and negotiation.

The local union representative spent in the region of 168 hours or approximately 24 days over 18 months on this case. The associated cost of release from normal duties at the respective supply rate is £2,340.

Had the member not had union representation, he would undoubtedly have taken the case to tribunal. The union would have covered the member's legal costs but the school would have had to prepare and defend themselves in an employment tribunal which would have been listed as a 5 day hearing. The legal costs for the school would have been solicitor's fees of approximately £20,000 plus VAT. Since the case involved two strands of discrimination, the school would have considered using a barrister. Barristers' fees are at least £1,500 per day (and may be much more) so including preparation time this could easily have been in the region of a further £10,000 plus VAT.

The potential costs of this case had it not been resolved by the intervention and support of the trade union concerned have been assessed as follows:

Union rep	24 days @ £130 per day supply rate	£ 3,120
Solicitor's fees		£ 24,000
Barrister's fees		£ 12,000
TOTAL		£ 39,120

Further associated costs for the school would have been the time for staff in the school in preparing for the case and being witnesses at the hearing. If we take conservative figures of:

Headteacher	12 days @ annual salary of £90,000	£ 2,959
Admin support	12 days	£ 657
Witnesses x 8	2 days per person @ supply rate	£ 2,080
TOTAL COST		£ 5,696

If the school in question had been a maintained school or an academy paying into the facilities budget, their annual rate for this would have been **£2,040**.

If the school were releasing their school rep to support this member at an hourly rate the cost would have been **£4,244**. This represents a saving of **£1,452** even with no additional costs as indicated above. However, a School Representative can neither advise on nor represent a member in an employment tribunal claim.

By settling via a compromise agreement rather than having to represent themselves at employment tribunal, **the school saved at least £39,120** before consideration is given to any award that would have been made if the member won his claim. The teacher would not have signed a compromise agreement without union support and would certainly have continued to pursue his intended course through the employment tribunal if not given timely and competent advice regarding case prospects and settlement terms by his trade union. The employment tribunal service is well-known for being inundated with claims from unrepresented claimants with little understanding of legal processes and ultimately poor case prospects, whereas none of the teacher trade unions would ever support a member in

pursuing a claim without reasonable prospects of success being clearly assessed and identified. The trade union rep's input into this at an early stage is a key element that needs to be supported properly by schools.

Paying into the facilities budget saved this school at least £40,572 after taking into consideration their contribution to the facilities budget.

Case Study 2 – Dispute Resolution Case

Whether they are an employer or a trade union representative, everyone is generally committed to transparent, effective and positive employment relations. This is stipulated under recognition agreements but, in any case, is a good practice model. Dispute issues do occasionally arise within a school, usually around working conditions or practices or the introduction of new measures, and the maintenance of positive employment relations in that context becomes especially critical.

It is in the interests of all employees and employers to resolve potential dispute issues as near to their point of origin as possible and with the minimum amount of conflict and disruption occurring. Schools want to see matters resolved in a timely and effective manner so that their focus can return to the proper business of teaching and learning and the management of their establishment. It is also the wish of every trade union to work in such a manner.

For these reasons, all parties always work hard to achieve agreement and constructively negotiated outcomes that are mutually beneficial and agreeable. If it is to be achieved successfully, this takes time (and therefore money.) Without that commitment to resources being given, any dispute that came to the attention of the unions, no matter how trivial it may be in its origins, would translate immediately into collective balloting activity and/or collective employment tribunal applications, which we do not see as being in the interests of schools or members. This is particularly relevant in the initial stages as all evidence demonstrates that disputes are most capable of constructive resolution at their early phase.

Below is an outline of a dispute issue that arose in a school which we have analysed for time spent and costs to illustrate how and why we believe the intervention of trade union representatives saves schools considerable time and money.

Context and Progress of Dispute:

The school wished to change its Directed Time formula to lengthen the school day. In addition, there was a wish to introduce one late finish per week (5pm) for teachers in exchange for leaving earlier (2pm) on a Friday afternoon once a month. Although the members understood the school's rationale and were not totally unhappy about all of the proposals, the effect of the school's proposal overall was to add 35 minutes to each teacher's contact time each week. This they were extremely unhappy about and the view of all three unions involved was that this would breach the relevant teacher conditions if implemented.

There was a mix of locally based representation, with two out of the three main teacher unions having a School Representative. Joint and separate members' meetings had been held to consult and discuss the issues and, in the case of the represented unions, indicative ballots had been conducted because there was a strong request made for industrial action in response to the proposal from members almost immediately. These meetings had demonstrated virtually unanimous support for action to oppose the proposals being requested and both the local reps were asked to take this up with the Headteacher immediately. There had been one local meeting to discuss the situation but this had not gone well: the reps had

essentially refused to discuss the proposals because it was outside of their union defined remit to do so, but had informed the Headteacher that everyone was upset, ballots were being requested and he had no prospect of implementing his proposal. The Headteacher had become extremely defensive and had stated that he intended to complain about the behaviour of both reps to their respective unions.

At this point, the matter was referred to the Local Secretaries, all of whom worked at other schools. There was also consultation with the Regional Officers of the unions, both paid and elected. A joint Secretaries' letter was produced detailing the concerns expressed by members and sent to the Headteacher and Chair or Governors. A meeting was requested as a matter of urgency to discuss the situation and see if it might be resolved. In the case of one union, there was also 'behind the scenes' involvement from their National Officers because of the potential for a formal dispute.

In tandem with this, the Headteacher wrote a letter to each of the unions formally complaining about the attitude of the local reps. This greatly complicated the situation and led to an almost irretrievable break down in relations locally because of the entrenchment of positions. However, it was believed he may have done this in the heat of the moment, so the Headteacher was contacted by telephone by one of the Local Secretaries and was persuaded to withdraw these complaints in favour of assistance towards a dispute resolution process, since no progress could ever have been made otherwise.

An initial dispute meeting was held with the Headteacher, three Governors, a Personnel Officer from the school and a HR Adviser from the relevant Local Authority. At the first meeting, the key issues from each side were explored in a controlled and appropriate manner, agreement was reached regarding how the negotiating process would be facilitated and barriers to progress each side felt existed were identified. This meeting took 4 hours and included specifications from each side for a joint document to agree how the resolution process would go forwards. This was drafted and shared afterwards, outside of the meeting process and it was used to inform all the meetings that followed. The document took around 6 hours to produce, consult and come to agreement upon.

There followed a series of six further meetings, all of around 3 hours duration, in which negotiations continued and progress was achieved. The trade union side also held a joint pre-meeting for an hour before each of these to ensure continuity and assist progress of the dispute. Eventually, it was possible to come up with a re-negotiated proposal that met the needs of both the school and its teacher employees, and the school was able to implement this positively for the following September after an effective consultation exercise to complete the process.

Commentary and Costing

The involvement of the locally based Association/Branch contacts in this dispute was crucial to its successful resolution. Without it, there could not have been the same level of commitment to a joint process and partnership to succeed in getting to a satisfactory resolution. The local representatives at the school were under significant pressure from their members and the Headteacher found it very difficult to negotiate on his original proposal because of the way in which it had been introduced and responded to right at the beginning. All of the reps' time was funded via the existing facilities arrangement, which would not be possible without the LAFTP continuing in Trafford Authority.

There was also considerable activity involved outside of the meeting schedule, to ensure good liaison and communication at all levels and a continuing commitment to the process. This time also included the drafting and sharing of documents, for both the school and the members the school was under an obligation to consult with. In this case, the three Secretaries met together and undertook those activities jointly, to maximise the best use of their available facilities time.

As travel time also had to be factored in reps were absent from their schools for longer than just their contact time, for several this was a whole day at a time just to attend the meetings in themselves.

Had the local representatives been unable to assist the situation because of the lack of appropriate facilities support, then the situation would have relied on the employed officials of the three unions becoming involved in the alternative. This would have inevitably made the dispute appear much more serious and high-level than it needed to be, particularly at the outset. In the case of at least one union involved, it would also have necessitated the direct involvement of the General Secretary because a dispute was declared and then the procedure outlined in the Burgundy Book would have been invoked, meaning nothing could be changed or negotiated upon until there had been a National/Local Deputation meeting. That involves a large number of people and can take months to see through to fruition. It is also likely there would be a simultaneous ballot for industrial action if this route were to be taken.

Had it been adopted, that approach would have severely limited capacity for resolution on both sides, it ran the risk of missing locally-based knowledge and intelligence and the whole situation would have taken much longer, become intractable and would have remained extremely difficult to resolve.

In addition, owing to their wider level of functioning and resulting commitments, it is highly probable that all the employed officials would struggle to find many days and times on which they could all be available which would also suit the school. The school would then have had to meet with each union separately (in the case of at least one union after the National/Local Deputation process had taken place.) In that circumstance, assuming the pattern of meetings above, the Governors, the Headteacher, the Personnel Officer and the HR representative would have to attend three times as many dispute meetings – even if there were only the seven above that were actually needed to resolve this case, this would amount to twenty-one meetings to resolve the issue overall. That has a significant cost implication for the school, even without anything else being accounted for.

As it was, since facilities funding was available to the key local activists of each union, the costs to the school were as follows:

3 x secretaries attending 7 meetings, inc. pre-meets Facilities funded – 84 hours total	NIL COST
2 x local reps attending 7 meetings, inc. pre-meets Facilities funded – 58 hours total, inc. 1 hour for liaison/prep	NIL COST
Secretaries (3) and reps (2) consulting with employees Facilities funded 4 mtgs – 80 hours total	NIL COST

Secretaries drafting reports, agreements, updates etc Facilities funded – 30 hours total	NIL COST
Time spent travelling to/from school (assuming 1 hour each way) for Secretaries x 3 Facilities funded – 66 hours total	NIL COST

Had the school not been part of its local authority's LAFTP, and assuming supply cover costs at a figure of £130 per day (approx. £21.66 per hour), these costs would have been:

3 x secretaries attending 7 meetings 84 hours total	£ 1,819
2 x local reps attending 7 meetings 58 hours total	£ 1,256
Secretaries (3) and reps (2) consulting with employees 80 hours total	£ 1,733
Secretaries drafting reports, agreements, updates etc 30 hours total	£ 650
Time spent travelling to/from school 66 hours total (assuming 1 hour each way)	£ 1,429
GRAND TOTAL COST TO SCHOOL	£ 6,887

(NOTE: Both tables assume that the consultation with employees is a cost that falls to the employer because of the legal obligation to consult where new contractual proposals are being negotiated in recognised workplaces.)

Had the school been an academy paying into the facilities fund to support the resolution activity by the local trade union reps, their costs for this would have been the schools delegated sums – this would range from £633 for 300 pupils up to £1,899 for 900 pupils in a school.

On the figures above, this would represent a saving of between £6,254 and £4,988 in a single year after taking into account the school's contribution to the fund.

Costs Not Included Above

These figures only represent costs for trade union and/or member consultation time, they do not include any time that was required for school or Local Authority representatives to engage in and seek to resolve the dispute amicably, so the true business costs would have been considerably higher, probably at least twice the amount indicated above. For the purposes of this case study, we have only assessed the trade union time and costs as these are the figures we would present to any school that decided not to purchase the facilities of the Local Union Representatives as invited.

Further to the costs indicated above, without local union secretarial intervention, it is extremely likely that this dispute would have proceeded into a legal arena at a very early stage, with the possibility of failure to consult claims being lodged by all three unions on behalf of each and every member (almost every teacher working there in this case.) Instead of this, the facilities fund enabled constructive attempts to be made by our secretaries to resolve it as locally as possible. Had that not been available, the spectre of accumulating legal costs is raised immediately for any school, even before any tribunal process takes place, as in the case study example given above. Had such claims been lodged and won by the three unions involved, the award for failure to consult may have been quite considerable in a dispute case,

as it is calculated based on the amount awarded for each member who is part of the relevant bargaining group.

This case study was costed only based on the real trade union time taken to resolve it. We believe it demonstrates clearly that the benefits to a school of purchasing facilities time far outweigh the costs of any significant dispute resolution activity, even where no recourse is taken to legal proceedings by either party. In that context, it represents very good value for money to a school.

5. FACILITIES TIME POTS VERSUS ALTERNATIVE MODELS

As explained earlier, it is not a question of whether an employer wishes to pay or not, but rather what the best mechanism is for employers to discharge this legal obligation.

It has been suggested that alternative systems of fulfilling the legal obligation to provide Facilities' Time for union duties should be explored. A common misconception is that local union officers are employed by their unions and funded by membership subscriptions – this is not the case. Local Officers are elected and are employed by local schools and released to undertake union work which is mutually beneficial to the employer.

a. 'Pay As You Go' System

One Multi-Academy Trust has suggested that schools/academies could be billed at an hourly rate of £30-40 per hour for any casework done in their establishments, perhaps with the option to book time in blocks of 10 hours and/or pay a small annual retainer (e.g., £200). We do not believe that this system is viable for the following reasons:

- It will not be possible for schools to budget for such costs as it cannot be predicted how much time will be needed for cases each year;
- Casework (like maternity leave) does not fall evenly between schools and between years. Some years schools may find they save money and do not need the service of union reps at all but in other years the costs could vastly exceed the current formula allocations;
- The time spent doing cases that involves meetings with Heads and HR etc is only the tip of the iceberg with union officers spending a great deal of extra time meeting with members and preparing for meetings;
- There is also a lot of time spent resolving members' concerns informally and management will not be aware that this has taken place until unions have to account for the time spent on these;
- There is a risk that it will create a perverse incentive to escalate rather resolve cases in order to ensure that there is sufficient funding to meet the current FT bill;
- This will create a great deal of extra administration in operating this invoicing system;
- This system does not provide any funding for the other duties of union reps such as meetings with the LA, Policy Development, Health & Safety etc.

b. 'Home Grown' Reps

Other MATs have suggested their preferred model is that, rather than paying into their LA Facilities' Time pots, members of their own schools' staff could become 'chain reps' and be given time out of class to undertake union duties on behalf of their colleagues. This suggestion has some merit and is supported in principle by some unions.

However, there are some serious obstacles to making this work in practice:

- All the unions are struggling to find volunteers to act as official School Representatives, because many staff are afraid to 'put their heads above the parapets'

and see becoming union reps as potentially detrimental to their personal career progression, let alone wishing to become 'super reps' for whole MATs;

- School/Chain Reps will need considerable training to develop the level of knowledge and expertise of our current team of local officers. A minimum of 10 days per year will be required for every rep for every union in every school for this to even begin to be feasible;
- There is a frequent turnover of school reps as staff move jobs which means finding and training new school-based reps is always going to be a constant battle;
- Some casework is simply not appropriate for school-based reps to undertake, such as redundancy situations where reps have a vested interest in the outcome of staffing reduction consultations for example, or when reps themselves are involved in sensitive situations or concerns about confidentiality arise.

6. TRAINING

Should schools choose not to buy in to collective facilities arrangements, each school rep will need to be trained to an appropriate level. All reps are entitled to paid time off for training. The ACAS code for training of trade union reps' states, "It is necessary for union representatives to receive training to enable them to carry out their duties. Such training will enable them to undertake their role with greater confidence, efficiency and speed and thus help them work with management, build effective employment relations and represent their members properly."

The Burgundy Book states that accredited representatives of recognised teachers' organisations are entitled time off for functions connected with the training of teacher representatives including attendance at training courses arranged by the recognised teacher organisations at national, regional or authority level for this purpose.

We would anticipate that each school would need a union rep, health and safety rep and union learning rep (ULR) for each union, although it is likely that the head teacher unions will not have a ULR or H&S rep in each school as well as a workplace rep. Whilst the provision of training for an equality rep has not been included, it is possible that there would be at least one equality rep from each union within the trust. These reps would need to be released for training as follows and this pattern reflects the costs in the table below:

Union Role	Year 1	Year 2 onwards
School Representative	10 days	4 days
School Union Learning Rep.	5 days	2 days
School Health & Safety	5 days	3 days

Table of associated costs for release of reps for training*:

Year 1	Days per rep per teaching union	Cost of supply @£189/day per teaching union	Days for four teaching unions	Cost of teaching supply per school
Union rep	10	£1890	40	£7560
ULR	5	£945	10	£1890
H&S rep	5	£945	10	£1890
Total	20	£3780	60	£11340

Support Staff	Days rep per support union	Cost of Cover @£64/day support staff per union	Days for three support staff unions	Cost of support staff cover per school
Union rep	10	£640	30	£1920
ULR	5	£320	15	£960
H&S	5	£320	15	£960
Total	20	£1280	60	£3840
Grand Total Year 1	40	£5060	120	£15180

Subsequent years † (approx.)	Days rep per teaching union	Cost of supply @£189/day teaching union	Days for four teaching unions	Cost of teaching supply per school
Union rep	4	£756	16	£3024
ULR	2	£378	4	£756
H&S rep	3	£567	6	£1134
Total	9	£1701	26	£4914
Support Staff Unions	Days rep per support staff union	Cost of Cover @£64/day support staff per union	Days for three support staff unions	Cost of support staff cover per school
Union rep	4	£256	12	£768
ULR	2	£128	6	£384
H&S rep	3	£192	9	£576
Total	9	£576	27	£1728
Grand annual total subsequent years	18	£2277	78	£6642

*These figures represent minimum costs **per school** based on M6 and are subject to variation as the release of representatives of the Heads unions will be substantially more.

† These figures are for representatives who remain in post after year one. Should a new rep be elected each year then the year one figure would apply.

7. NATIONAL EXECUTIVE MEMBERS

Whilst the work of National Executive Members can be undertaken outside of Lancashire, the benefits of this work are reaped by Lancashire schools and the LA. Our ongoing efforts campaigning nationally to fight cuts to school funding have had a positive impact locally.

Likewise, over the years there have been a number of national funding streams we have helped LA officers to access, such as the Schools' Access Initiative, which have benefitted Lancashire schools.

We would support a joint funding agreement with other LAs in the North-West to spread the cost of National Executive Members more fairly and would encourage Lancashire to explore such a system with its NW neighbours.

8. CONCLUSION

We firmly believe that the current system of shared funding of FT, through de-delegation by Schools' Forum, remains the most cost effective and viable way of meeting this legal entitlement and will continue to benefit the schools, staff and pupils of Lancashire.

We hope that the case studies described above will provide sufficient detail for Principals, Headteachers and Governors to appreciate the real cost savings that paying into local authority facility time pots brings. The costs of de-delegation/buy-in are very modest compared to the very real risk of disputes escalating, and represent the most affordable, best-value option for schools. We believe that it is an essential investment to secure peace of mind and positive employment relations.

We are asking you to commit your schools to funding this agreement on an annual basis so the local officers of all unions can work with you in the best interests of the schools, the pupils, and our members across Lancashire Local Authority, for the future.

Thank you for taking the time to read this report we hope it has been useful to you and your school or academy.



LCC Schools Facility Time 2023/24

UNISON Submission

This report is UNISON's submission to the Schools Forum review of the Trade Union Facility Time element of the de-delegation proposals 2023/24.

UNISON is the largest public sector trade union in the UK with 1.4 million members and has hundreds of thousands of members working in schools. UNISON represents and organises all non-teaching staff in schools (school support staff) and is the largest trade union for school support staff in the UK.

The current facility time arrangements are not reflective of today's modern school workforce. That is to say that school support staff make up a very large proportion of the school workforce, yet facility time is granted almost exclusively to teaching representatives. UNISON believe there should be a greater allocation of facility time to UNISON to acknowledge our membership numbers and the vital role of support staff in the school workforce.

UNISON believe the current system of shared funding of facility time through de-delegation is the most efficient system to operate facility time and allow schools to meet their statutory obligations on facility time. It also demonstrates the commitment of school employers towards maintaining good and constructive industrial and employee relations. UNISON's representation to the Schools Forum is that the de-delegation for Staff Costs – Public Duties/Suspensions be agreed without any further reduction to Trade Union Facility Time (option a).

UNISON have also included an appendix which sets out the general benefits of facility time in greater detail.

UNISON's representations

Current allocations of facility time

UNISON has long stated that the current allocations of facility time are unfair on school support staff. Schools employ both teaching and non-teaching staff, often in equal numbers, and both groups of staff are equally entitled to trade union representation. The current allocations of facility time do not reflect today's school workforce and does not recognise the important role of support staff. The role and numbers of support staff has greatly developed and increased in recent time and yet facility time is almost exclusively allocated to teaching trade unions.

UNISON currently has the least amount of facility time (1fte). There is no correlation currently between membership numbers and facility time. Any review of School Facility Time should

take this into consideration when looking at allocation of facility time to each trade union. The Schools Forum could also take into consideration the Schools HR casework statistics to examine the split between teaching and support staff if such figures are available.

Yet again a portion of facility time has been unused and some of this unallocated facility time could be allocated to UNISON without any impact on other trade unions.

Some correlation between trade union membership in schools and amount of facility time would be fairer. Below is a table which uses the Schools Forum own figures. UNISON has amended the table to put UNISON on an equal footing, rather than treating UNISON as an “add on”, to highlight the disparity between allocation of facility time and membership numbers in schools.

UNION	NAHT	ASCL	NEU	NASUWT	UNISON
Allocation of facility time by FTE Representatives	1.6 FTE (12%)	1.2 FTE (9%)	6.0 FTE (46%)	3.2 FTE (25%)	1 FTE (8%)
Membership Numbers	608 (3%)	204 (1%)	6480 (34%)	5868 (31%)	5886 (31%)

As can be seen UNISON receives only 8% of the facility time by FTE but has 31% of trade union members in schools. UNISON believe support staff are as important as our teaching colleagues and this should be reflected.

Cost of UNISON facility time

It is likely that any additional facility time granted to UNISON would cost less than a teacher trade union because UNISON members are in general on a lower salary. If cost of facility time were analysed then UNISON is receiving an even worse settlement than the FTE comparison highlights.

Overall level of facility time

UNISON opposes any further reduction in the overall level of facility time (with further detail on this set out in the appendix). UNISON therefore advocates for option a). The HR report makes it clear that demand has remained high for Trade Union Representatives.

UNISON faced difficulty toward the end of the academic year in covering all the meetings at which our presence was required. Schools HR asked us if we could provide additional representatives to help cover which highlights that UNISON require a fairer allocation of facility time.

Method of providing facility time

UNISON believe the current system of shared funding of facility time through de-delegation by Schools Forum remains the most efficient and viable way of Schools meeting their statutory obligations on facility time and it helps maintain good and constructive industrial and employee relations (further detail on this set out in the appendix).

Conclusion

- UNISON should receive a greater allocation of facility time than it currently receives. UNISON is currently under resourced based on the Schools Forum's own figures.
- The allocation of facility time should not discriminate between teaching and non-teaching staff and there should be some correlation between facility time and membership numbers.
- Any unused facility time could be granted to UNISON.
- Additional facility time allocated to UNISON would likely cost less than teaching trade unions because support staff are paid lower salaries in general.
- The current system of shared funding of facility time remains the best way for Schools to meet their statutory obligations and maintain good employee and industrial relations.
- There should be no reduction in funding given HR statistics show case work remains high and expectations of demand on Trade Unions and employee/industrial relations are likely to increase. On that basis UNISON advocate for option a).

Appendix 1

General Benefits of facility time and the shared funding of facility time.

Statutory rights to paid facility time

There are three main trade union roles with statutory rights to time off and these are the traditional trade union workplace steward/rep, union learning reps and union health and safety reps. There are also some other legal time off rights where someone is representing a trade union.

An employer must give trade union representatives paid time off to carry out their trade union duties as per the Trade Union and Labour Relations (Consolidation) Act 1992 (TULRCA). Examples of duties are;

- Negotiations with the employer;
- Functions which the employer has agreed may be performed by the trade union;
- Receiving information and being consulted on redundancies, business transfers or pensions changes;
- Training in industrial relations matters.

Time spent in negotiations/collective bargaining is set out in TULRCA as involving;

- Terms and conditions of employment or physical conditions of work;
- Recruitment, suspension, dismissal;
- Allocation of work;
- Discipline;
- Trade union membership or non membership;
- Facilities for trade union reps and officers;
- Procedural matters – eg consultation.

Trade union side meetings are also an example of a trade union duty as union reps need to meet separately from management to discuss and share information. In addition to statutory provision there is substantial case law which clarifies the right to paid time off and there is guidance set out in the ACAS Code of Practice.

Union health and safety reps have paid time off rights under the Health and Safety at Work Act 1974. Health and safety reps must be permitted time off under the Safety Representatives and Safety Committee Regulations 1977 (SRSCR). They have similar rights to time off as

other representatives however the SRSCR defines safety reps as having “functions” rather than duties and an employer must permit them time off with pay “as shall be necessary”.

This time off covers;

- attending meetings;
- undergoing training;
- investigating hazards and dangerous occurrences;
- investigating complaints and welfare at work;
- making representations to the employer.

There other matters set out within the SRSCR also. The Health and Safety Executive (HSE) also provide guidance that adds to the time that union health and safety reps need to take off.

Union learning reps (ULR) help open up learning opportunities for union members and supports them during the learning along with encouraging and developing a learning culture in workplaces. ULRs have a right to paid time off under TULRCA to carry out their duties. ULR duties involve analysing learning/training needs, arranging and promoting learning/training and consulting with the employer about these matters.

All reps have rights to time off when acting as a companion. The statutory right to be accompanied at a grievance or disciplinary hearing allows workers to request and have a union rep/officer as a companion. Paid time off used in this way by a rep is equivalent to a trade union duty and is part of facility time and the employer must permit a rep to take the paid time off. This extends beyond the hearing to meeting with the employee in advance for example.

There are also extensive statutory obligations on employers to consult when making collective redundancies under TULRCA. This consultation is with the trade unions and must be sufficient and meaningful with a view to reaching agreement. The employer must provide specified information to the trade unions and the employer must consider representations from union reps and reply to them. Reps need reasonable paid time off in order for this to be achieved and the rights for this are set out in TULRCA.

There are similar statutory obligations on an employer under the Transfer of Undertakings (Protection of Employment) Regulations. Here employers are required to inform and consult with representatives. Again, paid time off is required to achieve this.

In addition, following the decision of the Court of Appeal in *UNISON, Vining & Ors v LB Wandsworth & the Secretary of State*, trade unions have a right to be consulted under article 11 of the European Convention on Human Rights on any workplace issue which affects their members.

Where reasonable paid time off is not granted claims can be brought in the employment tribunal and there is case law which expands upon the legislation as written. In addition where an employer fails to properly collectively consult over redundancies or TUPE transfers there exists a punitive measure called a protective award can be brought for each employee affected which can result in massive financial penalty to the employer of 90 days gross pay in collective redundancy situations or 13 weeks pay for transfers.

Benefits of facility time in general and the current shared funding system

The cost argument

UNISON recognises the obvious financial challenges facing schools. Trade union facility time is often described as a cost and in very simple terms a cost can be associated with a member of staff being fully or partly released on a permanent basis. There are two issues with that simplistic measure;

1. it does not factor in the benefits of trade union facility time in general and the efficiencies realised in shared funding of facility time through de-delegation , a matter which is elaborated upon elsewhere in this report; and
2. those released on facility time via this system, either partly or wholly, carry out duties which schools would be obligated to grant paid time off for anyway from their own budgets.

Therefore, simply reducing the amount spent on facility time would not generate expected savings for schools and would in UNISON's experience create additional costs, a matter elaborated upon elsewhere in the report.

Benefits of facility time

Notwithstanding that reps have a statutory right to paid time off as set out above there are benefits arising from paid facility time in general. The Trades Union Congress (TUC) has commissioned reports and analysis of the Government's own data from their Workplace Employment Relations Study (WERS). One such TUC report by Bradford University from 2016 is included as an appendix. Key points to note from this report are;

- Research commissioned by the trade union UNISON found that facility time;
 - Improved workplace relations and helped build the reputation of the employer as a good place to work.
 - Union representation enabled earlier intervention in relation to complaints, grievances and disciplinaries, which stopped them escalating which was less costly to the employer and the taxpayer as a result of reduced staff and legal costs.

- Union reps enabled better communication with staff during restructuring and redundancy processes, which led to greater understanding of management's rationale for the changes and reduced industrial action.
- In 2007 the then Department for Business Enterprise and Regulatory Reform (BERR – now BIS Department for Business Innovation and Skills) found the following benefits from trade union facility time based on WERS data from 2004;
 - Dismissal rates were lower in unionised workplaces with union reps – this resulted in savings related to recruitment costs of £107–213m pa.
 - Voluntary exit rates were lower in unionised workplaces with union reps, which again resulted in savings related to recruitment costs of £72–143m pa.
 - Employment tribunal cases were lower in unionised workplaces with union reps resulting in savings to government of £22–43m pa.
 - Workplace-related injuries were lower in unionised workplace with union reps resulting in savings to employers of £126–371m pa.
 - Workplace-related illnesses were lower in unionised workplace with union reps resulting in savings to employers of £45–207m pa.
- This gave £327-977m in savings across all sectors with around 60% being public sector equating to £223-586m pa.
- Updating this to 2014 figures to reflect the reduction in the size of the public sector and taking into account changes in real values gives a benefit of £250-674m to the public sector.
- Using the Taxpayers Alliance estimated total cost of public sector facility time (£108m in 2012-13) means **that for every pound spent on facility time, the accrued benefits have a value of between £2.31 and £6.24.**

There are clear benefits based on the Government's own data of paid trade union facility time in improving the working environment, promoting good and safe working practices free from discrimination and working with the employer to save jobs, protect services, retain skills and avoid compulsory redundancies.

UNISON believes in maintaining decent working relationships with schools to resolve any issues at the earliest possible stage and in the main the above benefits have been borne out in schools through that relationship.

Benefits of shared funding of facility time and the issues and risks if reduced

There are clear benefits to trade union facility time in general. UNISON believe the current system of shared funding of facility time through de-delegation by Schools Forum remains the most efficient and viable way of Schools meeting their statutory obligations on facility time. If the current system were to be substantially changed or reduced, then the cost of facility time is a cost that individual schools would ultimately incur through local school representatives having to be trained and released instead.

The current system ensures that there are highly trained and knowledgeable union representatives available for schools to work with to fulfil their legal obligations. It allows for good working relationships to be built between the reps and schools which assists in resolving workplace issues at the earliest possible stage. This then saves the school both the difficulty and cost of workplace issues escalating. UNISON believes that there are currently good working relationships with schools and UNISON have worked effectively and professionally with schools and LCC HR Officers. Given the pressures and challenges that schools face UNISON believe that having experienced and knowledgeable trade union representatives available will benefit Lancashire Schools.

If there were no de-delegation funding of facility time, then every school would need to have their own trade union representative and each school would have a legal obligation to release these staff during the school day with paid time off for any trade union duties required. Having to release representatives on an “as and when” basis for trade union duties and training would be an inefficient method to implement facility time arrangements for schools and cause additional difficulties around cover during the school day. This would also lead to disputes around granting of facility time and release of representatives.

Whilst some schools do already have local representatives it is usually those representatives with facility time funded through the current system that undertake the majority of trade union duties – for example representation or consultations – allowing for minimal disruption to schools.

UNISON expect that if the current arrangements are substantially changed or reduced then this will result in a need for UNISON to retrain existing representatives across Lancashire Schools and recruit and train new representatives. This will be necessary to ensure there are representatives available when members need them but also when schools need them too. Paid time off would have to be granted by each school for a substantial number of representatives to be trained.

In the event of a school not having a local rep there will be a considerable delay in having issues resolved or meetings heard. In UNISON there are no regional officials who would automatically step in to cover and this will result in delays addressing employee relations and industrial relations issues.

Considering the above the following risks of substantially changing the current arrangements are highlighted;

- The desired savings will not be realised, and it may actually increase costs;
- A possible worsening of industrial and employee relations;
- Disruption of day to day employee relations matters such as disciplinary hearings;
- Lack of staff engagement and consultation resulting in a less engaged and de-motivated workforce;

- More workplace issues, disputes and accidents resulting in greater cost through more demand on time and increased litigation against schools;
- Increased disputes and issues relating to requesting facility time itself, including increased claims brought against schools at the employment tribunal;
- Schools struggling to meet their legal obligations to consult, including increased claims brought against schools at the employment tribunal.

LANCASHIRE SCHOOLS FORUM
Date of meeting 18 October 2022

Item No 11

Title: Recommendations of the High Needs Block Working Group

Executive Summary

On 27 September 2022, the High Needs Block Working Group considered a number of reports, including:

- High Needs Block 2022/23 – Budget Monitoring
- High Needs Block Funding 2023/24
- HNB Indicative Commissioned Place Numbers 2023/24
- MASH Education Annual Report
- Lancashire Hospital Education Service: Annual Report: Academic Year 2021-22

A summary of the information presented, and the Working Group's recommendations are provided in this report.

Recommendations

The Forum is asked to:

- a) **Note the report from the High Needs Block Working Group held on 27 September 2022**
- b) **Ratify the Working Group's recommendations.**

Background

On 27 September 2022, the High Needs Block Working Group considered a number of reports. A summary of the information presented, and the Working Group's recommendations are provided below:

1. High Needs Block 2022/23 – Budget Monitoring

Due to the cost and demand led pressures on the High Needs Block budget, arrangements were introduced from 2018/19 to provide the Forum with termly budget HNB 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 2022. 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 on recovery plans with them.

The figures for the summer term do not indicate the significant increases in requests for EHCP's that are indicated to be 45% higher than in previous years. It is expected that this is an unexpected impact after Covid. It is expected at this time, that this will have implications on demand and expenditure over the current and future terms and into future years.

It is anticipated that the final outturn position will come in significantly higher than the current forecast based on historic trends.

Members understood that it cannot be identified at this moment due to the current implications the sector is facing.

Sally Richardson confirmed the increase in EHCPs from January – July, the amount received so far is the equivalent to what would normally be requested in a full year, the forum asked if Inclusion expect new EHCPs to continue at this rate, Sally confirmed at this stage it is unknown if it is a catch up from Covid and will slow down or if it will continue at this rate

It was mentioned that a lot of children are going into Primary schools, and they have not been picked up by Early Years as requiring additional support and therefore additional pressure on Primaries to get these children assessed for EHCPs

Regarding the £10 million forecast underspend, headteachers asked if we are usually at this position in previous years and were surprised that we are showing an underspend with the increase in demands. Kevin Smith confirmed that we are not always in this position of surplus by Summer Term and that we may be looking at an approx. underspend of £ 5 million by year-end.

Kirsty Lister confirmed that although LCC is in a good position regarding surplus on the High Needs Funding. The demands on the service are increasing at a lot faster rate than the funding and within the next couple of years we could be looking at a deficit position and so we need to review the Inclusion strategy and discuss it at these meetings going forward.

The Working Group

a) Noted the report.

2. High Needs Block Funding 2023/24

High needs funding is increasing by a further £570 million, or 6.3%, in 2023-24. This brings the total high needs budget to £9.7 billion. The high needs NFF will ensure that every local authority receives at least a 5% increase per head of their 2-18 population, with some authorities seeing gains of up to 7%. Alongside DfE's continued investment in high needs, the Government remains committed to ensuring a financially sustainable system, where resources are effectively targeted to need. Later this year the Government will confirm the next steps in implementing our reform programme, following the consultation on the SEND and Alternative Provision Green Paper published in March.

Final allocations of schools, high needs and central schools services funding for 2023-24 will be calculated in December, based on the latest pupil data at that point, when DfE announce local authorities' Dedicated Schools Grant allocations.

High Needs Block National Funding Formula (NFF) for 2023/24

DfE announcements confirm that the basic structure of the high needs National Funding Formula (NFF) for 2023/24 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 2023/24 is set out below.

The high needs National Funding Formula (NFF) floor and gains cap have been set as follows for 2023/24:

- The funding floor – this ensures that all local authorities' allocations per head of population will increase by a minimum percentage compared to the baseline. For 2023-24 we are setting the funding floor at 5%, having adjusted the baseline to include the supplementary high needs funding that was allocated to local authorities in December 2021, following the 2021 spending review.
- The gains cap – the limit on gains per head of the population compared to the baseline. For 2023-24 we are setting the gains cap at 7% which means that local authorities can see an increase of up to 7% before their gains are capped (again, compared to a baseline that takes account of the supplementary high needs funding allocated in December 2021).

The hospital education factor will also be uplifted by 5%.

Reflecting the range of opposing views on the appropriate weight to place on the historic spend factor, and the need for a gradual transition to a formula that relies less on past patterns of the demand for and supply of high needs provision, DfE has decided to keep the historic spend factor at the same cash value in the 2023-24 NFF as in 2022-23. The

increase in the total high needs amount to be allocated means that, the proportion of total funding going through the historic spend factor will continue to reduce, from 31% of the 2022-23 formula allocations to 29% in 2023-24. The Government will keep this factor under review in future years, with a view to removing it completely when we have alternative proxies to include within the formula.

Lancashire Position

The July 2022 government announcements also contain provisional 2023/24 allocations for all DSG funding blocks, except for early years. The Lancashire information is provided in the table below and it should also be noted that the early years block figures for 2022/23 have been replicated for 2023/24 to complete the 2023/24 DSG estimate. The baseline figures also incorporate schools supplementary grant allocations, which were issued as a separate grant in 2022/23.

Forecast DSG Income	2022/23 Baseline £m's	DfE notional 2023/24 allocation (using Oct 21 data) £m's	Difference £m's	Difference %
Schools Block	899.471	917.412	17.941	2%
High Needs Block	172.44	183.029	10.589	6%
Early Years Block (NOT UPDATED)	82.472	82.472	0	0%
CSSB	6.8384	6.7962	-0.042	-1%
Total	1,161.221	1,189.709	28.488	3%

The Lancashire High Needs Block is forecast to increase by circa 6% for 2023/24.

Members will be aware that demand growth over the last few years has been circa £10 million per year and inflationary pressures will only add to the cost increases for the sector going forward. There is therefore expected to be considerable strain on the HNB in 2023/24 and beyond. An initial analysis of these costs pressures had been utilised to provide forecast analysis for members.

At the individual school level, there are further considerable costs pressures currently facing the sector, with staff costs, energy and general inflation all increasing significantly.

The Inclusion and Engagement Team is doing some valuable work with some of the schools but it is not advertised well and more schools need to be informed of this service.

The Working Group:

- a) **Noted the report.**

3. HNB Indicative Commissioned Place Numbers 2023/24

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 2023/24.

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

PRU Process 2023/24

It was agreed that correspondence on indicative place numbers for 2023/24 to PRUs should not be issued in July 2022, but is instead circulated in the autumn term 2022, by which time it is hoped that indicative data will include input from the service to refine the commissioned places to figures that will be more closely aligned to the final budget places and can take account of the latest recommendations from the AP strategy group.

Special School Process 2023/24

No changes to the procedures that operated in 2020 were proposed for special schools. The May 2022 census data was available in time to communicate with special schools before the end of the summer term of 2022 and experience suggested that these indicative numbers should be closely aligned to likely places that will be included in the final budgets for the sector.

In addition, the additional place top-up funding arrangements will continue to operate in 2023/24, where the actual number of pupils at each redetermination is greater than the number of places commissioned on the budget forecast, so a continued safety mechanism remains built into the system.

In July 2022, following the ratification of the working group's recommendations by the full Forum, correspondence was issued to special schools with the indicative place figures for 2023/24 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 as Appendix A. A total of 3,329 places are included in the indicative commissioning process at July 2022. This figure is a total increase of 141 compared to July 2021.

The Inclusion Service have been working on agreeing on the commissioned PRU/Alternative Provision places and has provided an update on the meeting. A copy of the indicative place number for each PRU was provided to the working group as Appendix B.

2023/24 TPG and TPECG Allocations

Following a decision from Forum, the LA updated the 2023/24 HNB funding models to incorporate the TPG and TPECG place-based allocation methodology after reviewing updated DfE high-needs guidance for 2023/24.

Special & PRU Modelling 2023/24

Members will recall that from 2021/22 the Teachers Pay & Pension Grant (TPECG & TPG) was included in the National Funding Formula (NFF), which we receive as part of our

Dedicated Schools Grant (DSG). Both special schools and pupil referral units (PRU's) have been funded under the schools' specific funding, which was shown separately for transparency and clarity based on termly pupil numbers. In line with Department for Education's (DfE) HNB operational guidance, this funding should be provided on commissioned places and funded at a minimum of 40 places.

In March 2022, a one-time top-up payment was made, which will be repeated for the last time in March 2023 to cover any difference in funding this may have caused. Early modelling has been carried out for 2023/24. This now changes the TPECG & TPG top up funding to be based on commissioned places instead of termly pupil numbers. This will remove the need for additional payments to be made from the 2023/24 financial year onwards.

PRU's Modelling 2023/24

The change in modelling for 2023/24, has also removed the need for the intervention to place additional pay and pension grant top up. This was introduced for PRU's in 2021/22 to offset the shortfall in funding due to the impact that intervention places had.

Special Schools Modelling 2023/24

There has been a change in modelling for 2023/24 for the pay and pension grant, to be in line with DfE guidance, this funding works on the combined pre and post 16 commissioned places.

Early modelling has raised an issue due to the above, so are proposing a minor change to the Post 16 commissioned place funding payments for the Summer and Autumn terms. Historically post 16 commissioned places have been paid Apr-Jul and Aug-Dec, with pre 16 places paid Apr-Aug and Sep-Dec. We are proposing to move the Post 16 commissioned places payments in line with Pre 16 so that both Pre and Post 16 are paid Apr-Aug and Sep-Dec. This would simplify the funding, and put them both in line with the authority's section 251 return and DSG payments.

Modelling shows that the impact on this is minimal, however, LA will make a one-off payment in 2023/24 for any schools that may have a small reduction in funding.

Sally Richardson attended this meeting to provide further updates about commissioned PRU's numbers. The working group found it valuable for Sally to be present at the meeting as she could provide further information on spending, the use of resources and the impact on the budget.

Members requested a brief report to be circulated that will state current SEN units in mainstream schools. This will be taken on the agenda for the following meeting of the working group.

A question was raised regarding the Broadfield site and what was happening with this. None of the Officers had an update on this and will report back when more information has been gathered.

The Working Group

- a) **Noted the report, accepted the number of commissioned places and that further work was taking place on the alternative provision strategy that could affect places.**
- b) **Supported changes to modelling for 2023/24.**

Appendix A

Indicative Commissioned Places 2023/24

Special Schools

LCC No	School Name	Pre 16	Post 16	Total Places
00133	Bleasdale School	25	9	34
00134	Royal Cross Primary School	26	0	26
00139	Hillside Specialist School and College	92	8	100
01130	Morecambe and Heysham Morecambe Road School	171	0	171
01131	The Loyne Specialist School	78	35	113
02130	Great Arley School	117	0	117
02131	Brookfield School. Poulton-le-Fylde	74	0	74
02132	Thornton Cleveleys Red Marsh School	79	19	98
04133	Kirkham Pear Tree School	85	17	102
06131	Moorbrook School	52	0	52
06134	Acorns Primary School	86	0	86
06135	Sir Tom Finney Community High School	126	63	189
07130	Moor Hey School - A Specialist Mathematics and Computing College	133	8	141
07131	The Coppice School	51	13	64
08135	Hope High School	90	0	90
08136	Kingsbury Primary School	89	0	89
08137	West Lancashire Community High School	83	39	122
08138	Elm Tree Community Primary School	143	0	143
09130	Chorley Astley Park School	169	0	169
09131	Mayfield Specialist School	102	24	126
11130	Oswaldtwistle White Ash School	111	0	111
11131	Broadfield Specialist School For SEN (Cognition and Learning)	134	37	171
12134	The Rose School	67	0	67
12135	Holly Grove School	120	0	120
12136	Ridgewood Community High School	125	36	161
13133	Pendle View Primary School	124	0	124
13134	Pendle Community High School and College	116	40	156
14132	Rawtenstall Cribden House Community Special School	90	0	90
14580	Tor View Community Special School	183	40	223
		<u>2941</u>	<u>388</u>	<u>3329</u>

Appendix B

PRU Places

Sch No	School No	Type	Phase	22/23 Places	23/24 Places
01141	Stepping Stones School	PRU	Primary	32.00	32.00
07141	Golden Hill Leyland Centre	PRU	Primary	50.00	50.00
01149	Chadwick High School	PRU	Secondary	70.00	70.00
02143	Mckee College House	PRU	Secondary	130.00	130.00
09145	Shaftesbury High School	PRU	Secondary	120.00	120.00
06141	Larches House School	PRU	Secondary	110.00	110.00
11142	Oswaltwistle School	PRU	Secondary	95.00	95.00
08147	The Acorns School	PRU	Secondary	65.00	65.00
12504	Coal Clough Academy	PRU	Secondary	140.00	140.00

4. MASH Education Annual Report

The Forum will be aware that the funding for the Multi-Agency safeguarding Hub (MASH) was transferred to the HNB in 2022/23, as the DfE were reducing the historic commitments costs included in the Central school Services Block (CSSB). For 2022/23, £150k was included in the HNB budget, and a similar allocation will be included in initial budget proposals for 2023/24.

The service has now provided its annual report for 2022 and this was provided to the working group.

Working group members stated the service is invaluable and provides excellent reassurance for schools.

The Working Group:

- a) Noted the report.**
- b) Expressed views about the MASH report.**

5. Lancashire Hospital Education Service: Annual Report: Academic Year 2021-22

The Lancashire Hospital Education Service (LHES) is a centrally managed service that is funded from the DSG High Need Block. In FY 2021/22 the service was allocated £927k.

The service aims 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.

Educational Improvement services due to unforeseen circumstances could not attend the meeting to present information from the report.

Members requested that Audrey Swann attend a meeting on 29 November 2022, to provide further background on her report.

The Working Group:

- c) Noted the report.**

LANCASHIRE SCHOOLS FORUM
Date of meeting 18 October 2022

Item No 12

Title: Recommendations of the Early Years Block Working Group

Executive Summary

On 4 October 2022, the Early Years Block Working Group considered a number of reports, including:

- Appointment of EYB Working Group Chair
- Early Years PVI representation on the Schools Forum
- Early Years Block Funding 2023/24
- Urgent Business Procedure on DfE Consultation on Early Years National Funding Formulae and Childcare: Regulatory Changes
- DfE Visit to Lancashire
- Energy Costs and Nursery Closures
- Education Partnership and Around the School and Settings (TASS)

A summary of the information presented, and the Working Group's recommendations are provided in this report.

Recommendations

The Forum is asked to:

- a) **Note the report from the Early Years Block Working Group held on 4 October 2022**
- b) **Ratify the Working Group's recommendations.**

Background

On 4 October 2022, the Early Years Block Working Group considered a number of reports. A summary of the information presented, and the Working Group's recommendations are provided below:

1. Appointment of Working Group Chair

This was Peter Hindle's final meeting and Philippa Perks has been nominated as his replacement as the Working Group Chair.

Members elected Philippa Perks, as the new working group Chair.

The Working Group:

- a) Thanked Peter for his contribution to the Forum.**
- b) Confirmed that Philippa is elected as the new Early Years Block Working Group Chair.**

2. Schools Forum Early Years Block Membership

Following Peter Hindle leaving, we wrote to all EYPVI providers to nominate candidates to join EYWG as Peter's replacement.

We have received a single nomination for Sarah McGladrigan.

The Working Group:

- a) Welcomed Sarah McGladrigan as one of the formal Schools Forum representatives from September 2022.**

3. Early Years Block Funding 2023/24

On 19 July 2022, the DfE made announcements about the 2023/24 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 2023.

Working Group members will know that in 2020/21 and 2021/22 the Forum agreed to transfer to £2m each year. In 2022/23, no transfer was possible.

However, to help support the transition the Forum agreed that £1m of DSG reserves could be utilised to support the early years' block budget in 2022/23.

DfE announcements included Schools Block Operational Guidance for 2023/24, and this confirmed that LAs continue to be allowed to transfer up to 0.5% of their schools block to other blocks of the DSG, with schools forum approval.

Further local modelling will be needed to assess the 2023/24 position, but at this point it is not expected that headroom will be available at levels that were accessible in 2020/21 and 2021/22.

The option of utilising some reserves to support the early years block may again be

considered in 2023/24.

The final position about possible Schools Block headroom will only be available in December once final 2023/24 DSG allocations are received.

If required, an urgent consultation about any possible Schools Block transfer could be held with schools and academies once the final DSG allocations from DfE have been assessed.

Whilst several uncertainties remain before any final; decisions can be taken about the early years block funding, the group may wish to express any initial views on the early years block budget for 2023/24.

There is obviously uncertainty, but the following details have been published by the DfE but are unconfirmed and could be impacted on by outcomes from consultations and other factors.

EY consultation indicates the 3/4 YO rate increasing by £0.21 as this now includes the teacher pay & pension grant being included in the base rate. Pending decision on the 4p from reserves.

2-year-old entitlement Lancashire is likely to receive an additional £0.06 per hour for the 2-year-old entitlement for 2023/24,

Supplementary funding hourly rate for maintained nursery schools is indicated to increase by £0.49 per hour. The increase in rate includes the TPPG included in the hourly rate for 23/24 to leave a forecasted rate per hour of £4.28 from £3.67 in 22/23.

Members understood that further modelling is needed. They recognise the sector to be historically underfunded and that Covid has affected children's development as they have missed out on important years. Members have expressed those children post-Covid require further work with their communication and emotional development.

The working group discussed how there is no separate funding for the provision of a free school meal for early years children who attend maintained schools for morning and afternoon sessions, and schools have either been funding these children from their wider schools budget, using EYPP or charging parents. It was discussed the fact that the statutory guidance does state that Local Authorities are expected to provide an FSM for early years children in maintained settings and the group agreed that the issue should be forwarded to the full Schools Forum for further debate. Andrew Cadman who is the interim senior adviser for Early Years, will also raise this issue with our DfE contacts, to get a view from them on where local authorities are expected to fund this from.

Members asked for DSG reserves to be utilised to support the additional 4p in the base rate for another year due to all the challenges they are facing.

The Working Group:

- a) Noted the report.**
- b) Expressed views about their current challenges and DSG reserve.**

4. Urgent Business Procedure on DfE Consultation on Early Years National Funding Formulae and Childcare: Regulatory Changes

This report provided an update on Forum decisions/recommendations taken since the last meeting using the urgent business process.

DfE Consultation on Early Years Funding Formulae (1)

On 4 July 2022, the DfE issued a consultation on changes on the Early Years Funding Formulae.

The consultation was launched after the last meeting of the Schools Forum and the deadline for responses is before the next cycle of meetings. The consultation documentation can be viewed on Early years funding formulae consultation document [Early years funding formulae consultation document \(education.gov.uk\)](https://www.education.gov.uk).

A draft Forum text for a response was circulated on 30 August 2022.

21 responses were received from members. The majority of members supported the draft response without any amendments. There were two suggested amendments to the draft response. One suggestion included a grammatical improvement which was reviewed and reworded and. The second comment was included to provide an actual answer instead of 'as above', which was amended.

A Forum consultation response was submitted on 15 September 2022 and a copy is provided in Appendix A.

DfE Consultation on Childcare: Regulatory Changes (Ratios) (2)

On 4 July 2022, the DfE issued a consultation on changes in Childcare: Regulatory changes. The consultation was launched after the last meeting of the Schools Forum and the deadline for responses was before the next cycle of meetings. The consultation documentation can be viewed on Childcare: Regulatory changes consultation document [Childcare: Regulatory changes - Department for Education - Citizen Space](#)

A draft Forum response has been prepared by the Early Years - Education Improvement Team.

A draft Forum text for a response was circulated on 7 September 2022.

8 responses were received from members. The majority of members supported the draft response without any amendments. There was only one suggested amendment to the draft response. It was a grammatical improvement which was reviewed and reworded.

A Forum consultation response was submitted on 15 September 2022 and a copy is provided in Appendix B.

The Working Group:

- a) Noted the report.**

Submitted to Early years funding formulae

Submitted on 2022-09-15 16:39:13

Introduction

What is your name?

Name:

Sylwia Krajewska

What is your email address?

Email:

Sylwia.Krajewska@lancashire.gov.uk

Are you responding as an individual or on behalf of an organisation?

Organisation

What is the name of your organisation?

Organisation:

Lancashire Schools Forum

What type of organisation is this?

Type of

Organisation:

Other

What local authority area are you or your organisation based in?

Local Authority

area: Lancashire

Would you like us to keep your responses confidential?

No

Reason for confidentiality (optional):

EYNFF additional needs factor

- 1 Do you agree with our proposal to update the underlying data in the additional needs factor in the EYNFF?

Yes

Do you agree with our proposal to update the underlying data in the additional needs factor in the EYNFF?:

We support the proposal to update the data in the additional needs factor so that the latest available data is used in the formula, and to update this data annually going forward. We agree that it is appropriate for the formula to be responsive to changes in the underlying data and keeping this data updated annually makes the formula more accurate and reduces the risk of turbulence that could be created if only sporadic updates were initiated.

- 2 Do you agree with our proposal to move to using the free school meals headline measure?

Yes

Do you agree with our proposal to move to using the free school meals headline measure?:

We support the move to using the free school meals headline measure, as this is consistent with the High Needs NFF.

- 3 Do you agree with our proposal to update the way in which the Disability Living Allowance data is used?

Yes

Do you agree with our proposal to update the way in which the Disability Living Allowance data is used?:

We support the proposed changes to the DLA data as they appear more accurate and responsive.

EYNFF area cost adjustment

4 Do you agree with our proposal to update the underlying data used in the area cost adjustment in the EYNFF, in particular the rateable values data and the GLM data, when available?

No

Do you agree with our proposal to update the underlying data used in the area cost adjustment in the EYNFF, in particular the rateable values data and the GLM data, when available?:

In principle, we are in favour of more up to date data being utilised in the formula. However, we cannot support this proposal as we oppose the use of the GLM data in the early years funding formula.

We do not believe that the use of this data supports the principles underpinning national funding formulae. It is not fair, transparent, simple, responsive or predictable.

The make up of the GLM factor is not reflective of staff costs in the EY sector. It includes the likes of the financial sector, with the significant salary levels, which would seem to have little relevance to early years staffing costs. We know that the majority of the providers pay staff on National Living Wage (NLW) rates. It does not therefore seem justifiable that some areas are being funded at considerably higher rates than others, when base funding within the sector is relatively even.

The current proposals for the 3 and 4 year old formula do not even update GLM data and the proposals indicate an intention to continue the use of information from 2013/14, which is clearly out of date and not responsive to any changes in staffing costs. The rationale for this consultation is that the formulae are responsive and updated annually going forward, so the inclusion of a factor reliant on data that is a decade old must be omitted from the formulae or replaced by a more appropriate mechanism.

If no suitable alternative data source is available that would target resources on a more realistic basis for EY sector staffing costs, we would urge the government to apply a cap to the differential, of perhaps 20%, as this is more reflective of the different level of costs between low and high cost areas.

ACA factors in the schools and high needs block formulae do not result in the level of unjust differentials that are applied in early years, so an alternative option may be to utilise a similar formula to other funding blocks in the DSG.

In addition, the data is not readily available or understandable for many providers.

5 Do you agree with our proposed amendments to the proxy measure for premises related costs in the EYNFF, including introducing schools rateable values data?

Yes

Do you agree with our proposed amendments to the proxy measure for premises related costs in the EYNFF, including introducing schools rateable values data?:

The proposed inclusion of the maintained sector data, the metres squared approach and the smoothing of the data are supported.

Teachers' pay and pensions grants

6 Do you agree with our proposed approach to mainstreaming the early years element of the teachers' pay and pensions grants?

Unsure

Do you agree with our proposed approach to mainstreaming the early years element of the teachers' pay and pensions grants?:

There does not appear to be an obvious solution to this issue and perhaps the approach proposed is the only option available.

However, this mechanism appears to disadvantage maintained primary school providers, who will not receive the same level of funding that they have received under the current grant allocations.

Whether or not we agreed with the original decision to support increased cost pressures in one part of the Early Year's sector and not another via the additional grant funding, the 'mainstreaming' of the grant funding in the schools block and high needs block distributes a similar level of funding to each recipient through the main funding formulae. This early year's proposal will not achieve a distribution of a similar level of funding to each recipient.

- 7 Do you agree with our proposal to update the operational guide to encourage local authorities to take account of additional pressures that some providers might face using the existing quality supplement?

No

Do you agree with our proposal to update the operational guide to encourage local authorities to take account of additional pressures that some providers might face using the existing quality supplement?:

There are significant cost pressures facing the early years sector, which are being compounded as the levels of DSG funding increase to the block have not kept pace with cost increases over a number of years, or with increases enjoyed by the schools and high needs blocks. Forecasts suggest that this underfunding is likely to continue. In these circumstances, feedback from the sector in Lancashire indicates that there is a preference to minimise the use of supplements and maximise the funding allocated across all providers via the base rate. We would therefore not support any change to guidance that encourages funding to be moved away from base rates.

2-year-old funding formula

- 8 Do you agree with our proposal to update the underlying data in the area cost adjustment in the 2-year-old formula?

No

Do you agree with our proposal to update the underlying data in area cost adjustment in the 2-year-old formula?:

Our concerns about the GLM data are set out in the EYNFF response above

- 9 Do you agree with our proposal to introduce a proxy for premises related costs into the 2-year-old formula?

Yes

Do you agree with our proposal to introduce a proxy for premises related costs into the 2-year-old formula?:

We agree that there should be consistency between the EYNFF and the 2-year-old formula.

Protections

- 10 Do you agree with our proposed approach to protections in the EYNFF for 2023-24?

Yes

Do you agree with our proposed approach to protections in the EYNFF for 2023-24?:

A crucial element when changes to the funding arrangements are being introduced is the relevant protections to ensure that funding reductions are manageable for those impacted by large variations in the calculations. We are supportive of the proposed approach to protections. It should be noted that based on current funding, Lancashire is not likely to see any significant protection, especially if the over budget pot is not expended to meet the protection element costs.

- 11 Do you agree with our proposed approach to protections in the 2-year-old formula for 2023-24?

Yes

Do you agree with our proposed approach to protections in the 2-year-old formula for 2023-24?:

In terms of protections, we support the proposal. The current funding does not appear to provide Lancashire with enough protection, particularly if the over budget pot is not used to pay for the protection element.

Reform of maintained nursery school supplementary funding

- 12 Do you agree with our proposal to introduce a minimum hourly funding rate and a cap on the hourly funding rate for MNS supplementary funding?

Yes

Do you agree with our proposal to introduce a minimum hourly funding rate and a cap on the hourly funding rate for MNS supplementary funding?:

We support the minimum hourly rates and cap for MNS funding as a mechanism to protect LAs/schools from significant turbulence and to provide a level of minimum funding protection across all LAs. However, we are concerned that the differential between the £3.80 minimum and the £10 cap is far too great to be justified and efforts must be made to distribute funding more evenly across LAs. ACA factors exist in the schools and high needs block formulae, but do not generate outcomes where some LAs are receiving almost 3 times the hourly rate of others. Should this be a more level distribution across the country as pay is similar across the country (LA's).

13 Do you agree with our proposed approach to rolling the teachers' pay and pensions grants into MNS supplementary funding?

Yes

Do you agree with our proposed approach to rolling the teachers' pay and pensions grants into MNS supplementary funding?:

The suggested approach for rolling the teachers' pay and pensions grants into MNS supplementary funding seems, for maintained nursery schools, reasonable and should allow allocations to be generated that are similar to those received through the grant funding.

Equalities Impact Assessment

14 Do you have any comments about the potential impact, both positive and negative, of our proposals on individuals on the basis of their protected characteristics? Where any negative impacts have been identified, do you know how these might be mitigated?

Do you have any comments about the potential impact, both positive and negative, of our proposals on individuals on the basis of their protected characteristics? Where any negative impacts have been identified, do you know how these might be mitigated?:

No

Any other comments

15 Are there any other comments that you would like to make about our proposed reforms?

Are there any other comments that you would like to make about our proposed reforms?:

In addition to the comments on individual proposals in the consultation, our biggest concern remains that the level of funding being provided for early years is not sufficient and this is affecting our ability to recruit and retain staff, which will ultimately impact on the level and quality of provision.

We would urge the government to provide additional funding for the early years block to ensure that the sector can continue to provide high quality education for our young children at the outset of their educational journey.

We would also ask that the early years block funding guidance and allocation announcements be amended so that they are on a similar timescale to the schools and high needs blocks, where provisional allocations are issued each July. As early years is one of the three main funding blocks in the DSG it seems appropriate that it should be dealt with on a similar timeframe and with similar considerations for funding increases.

Whilst it is right and proper to update and keep updated the EYNFF, the impact will be negligible if as a result of all this the DfE continue to underfund settings for their delivery. Last increase of 3.5 % delivered at a time when costs had increased by 7% only served to further damage the sector

Submitted to Childcare: Regulatory changes

Submitted on 2022-09-15 16:32:29

Introduction

About you

- 1 Would you like us to keep your response confidential? No

Reason for confidentiality:

- 2 In what capacity are you responding to this consultation?

Select an answer from dropdown list:

Membership organisation

If Other, please give details:

- 3 Where are you based in England? (PLEASE NOTE THAT THIS CONSULTATION APPLIES TO CHILDCARE IN ENGLAND ONLY)

Please select your region from the drop down list:

North West

- 4 If you are responding on behalf of an organisation: what is the name of your organisation?

Please type your answer in the box: Lancashire

Schools Forum

- 5 If you are responding on behalf of an organisation: what is your role within this organisation?

Select an answer from the dropdown list: Other

- 6 If you are responding on behalf of an organisation: how many people are employed by your organisation?

500 or more

- 7 If you represent any other type of organisation: what is the nature of your organisation?

Please type your answer in the box:

Schools Forum

- 8 If you are a parent or carer for a child: how old is your child/are your children? (Select all that apply)

- 9 Which forms of childcare do you currently use? (select all that apply)

Staff: Child Ratios

- 10 Do you agree or disagree with the proposed change to the current statutory minimum staff: child ratios in England for 2-year-olds from 1:4 to 1:5?

Please explain your rationale for this view in no more than 300 words.:

No.

Potential relaxation of ratios for two-year-olds in nurseries and pre-schools from 1:4 to 1:5 will not result in the delivery costs that the government has suggested. Recent engagement with the sector by a national organisation suggested that very few settings would enact the proposed new ratios as it would likely drive down quality whilst also papering over hugely challenging situation of staff recruitment and retention within the sector. Children are arriving at settings with varying levels of needs, those with additional needs will be hugely impacted by the change in ratios, and if settings do retain the current ratios to ensure high quality provision then there are no cost saving to be made.

For example, a setting with 16 2 year olds with 4 staff on current ratios would have an option to take on an additional 4 children (if space allowed), although it could be argued that 4 staff supervising 20 2 years olds will have a detrimental impact on the quality of provision.

Alternatively, the setting could release a member of staff and reduce the room six to 15 children. This will impact further on the retention of staff in the sector along with potential consequences for sufficiency of places. Proposal B and C: Childminder settings

11 Do you agree or disagree with Proposal B to change the EYFS wording on childminders' ratio flexibility for siblings?

Please explain your rationale for this view in no more than 300 words. :

Agree

Feedback from Childminders is that they would welcome this new wording as it provides some more clarity around flexibility, as although they are already able to do this within the current limited flexibility, they felt that the wording was not clear enough. Although in theory this would enable childminders to take more children, the feeling is, on the whole, that they will choose not to by prioritising quality, safety and security over this. Childminders will often think about how they would manage to evacuate in the case of an emergency, or to go on an outing, if they had increased numbers to manage. They also want to offer the best possible quality curriculum and do not want this to be watered down or devalued with increased ratios and similarly they want to be valued and treated as equal professionals within the early years sector.

12 Do you agree or disagree with Proposal C to change the EYFS wording on ratio flexibility for childminders' own children?

Please explain your rationale for this view in no more than 300 words. :

Agree

Feedback from Childminders is that they would welcome this new wording as it provides some more clarity around flexibility, as although they are already able to do this within the current limited flexibility, they felt that the wording was not clear enough. Although in theory this would enable childminders to take more children, the feeling is, on the whole, that they will choose not to by prioritising quality, safety and security over this. Childminders will often think about how they would manage to evacuate in the case of an emergency, or to go on an outing, if they had increased numbers to manage. They also want to offer the best possible quality curriculum and do not want this to be watered down or devalued with increased ratios and similarly they want to be valued and treated as equal professionals within the early years sector.

Further options for ratio reform

13 (For childcare providers) What are your views on having the following flexibility for 3-4 year-olds in your provision?

Where children aged 3-4 are attending a setting for less than 4 hours per day, the ratio of 1:8 can be increased to 1:10 (as in Scotland), although where staff are qualified to Level 6, the ratio of 1:13 would continue to apply.

Please give your views in no more than 300 words. :

14 What further flexibilities would you consider adopting to deliver your provision? (Select all that apply) If you selected

'Other', please provide details in the box below, in no more than 300 words. :

Adequate supervision while eating

15 Do you agree with the proposal to make paragraph 3.29 of the EYFS explicit that adequate supervision whilst eating means that children must be within sight and hearing of a member of staff?

Yes

16 Please explain briefly your views about this, including if you foresee any unintended consequences for early years providers as a result of this change.

Please explain your views in no more than 300 words. :

This is seen as a good proposal and will further support children's safety. Snack and mealtime preparation will be key. Some Childminders will have to consider where children eat and make sure they have all resources to hand if the dining space is separate to the kitchen to ensure that babies and children are supervised at all times, as we know choking can only take a second when your back is turned.

Further comments

17 What are your concerns (if any) about how the proposals may affect you or individuals in your organisation with protected characteristics?

Please give your answer in the box below, using no more than 300 words. :

It would be more difficult, with higher staff : children ratio, to spend the significant amount of time needed through conversations, story telling, circle times and puppet play for example, to really support our youngest children to really understand inclusion and diversity. Truly valuing diversity means actively

promoting equality and planning to meet the needs of all individuals, whatever their circumstances, and again this would be more difficult to achieve with staff under pressure with more children to care for. Inevitably more time would be needed to support with basic care routines, rest times, toileting, snack and meal times, leaving it more difficult to support children's learning and development.

18 How would you mitigate against these concerns in your organisation?

Please give your answer in the box below, using no more than 300 words. :

Settings are likely to strive to continue their support within this area of practice and provision but would be compromised, knowing that they have achieved this with more impact when working with less children.

19 Are you content for us to use your comments in any reporting? Comments will be anonymised.

Yes

20 Would you be happy for the Department or a research body working on its behalf to contact you to discuss your response to this consultation? If you agree, your personal data and responses to the consultation will be shared to allow them to contact you about your response.

Yes

21 {If willing to be contacted} For us to contact you about possible additional research, we need a named contact, email address and telephone number. Please provide these in the boxes below.

Please insert a contact name:

Sylwia Krajewska

Please insert a contact email address. : Sylwia.Krajewska@lancashire.gov.uk

Please insert a contact telephone number. :

+44 1772 532476

5. DfE Visit to Lancashire

Andrew Cadman provided a verbal update on the DfE visit.

The DfE visited Lancashire on 12th July. Andrew thanked everyone involved in making the visit from the DfE a productive and positive experience. There was limited time with the DfE officers but managed to include a visit to two settings as well as time with LCC officers and Cllrs at County Hall.

- In the first setting they had an opportunity to highlight the importance of current child ratios for 2YO as she has high numbers of 2YO, many of which have individual or family needs.
- In the second setting there was an opportunity to highlight the work of the MNS and the challenges faced linked to funding and often being off the radar for the DfE with school-based decision making.
- Philippa and Peter utilised their time in transit with the DfE officers and time at County Hall to cover a range of topics, including EY delivery costs, specifically how funding (inc funding formula) hasn't risen in line with the inflation or other roles in the education and children services sector, closure of provisions, and business rates
- At County Hall, officers and Cllr Rear were clear on the LCC's position with Early Years and the risks faced, despite the exemplary work by officers and the EY sector
- It was noted that the DfE very rarely meets with EY Sector representatives and LA officers where there is the level of positive relationship that we have in Lancashire. This is a testament to the hard work, commitment and passion that is delivered on a daily basis.
- DfE officers were impressed with the current take up rate for funded places, alongside the quality of provision that those children are attending.

Follow-up meeting 14th September

- Academisation of MNS – position has not changed from recent information regarding the legal position of working through the legal implications of academisation MNS. Andrew to link with Elaine Cluet who is leading on the school's element.
- Funding position hasn't changed with regard to what the national funding envelope is. No announcements re EY funding were included in the government financial statement on 23rd September.
- Point raised re government policies conflicting with each other (minimal wage vs EY funding etc). DfE informed that there is a currently greater cross-departmental collaboration on such matters, striving to align policies wherever possible whilst understanding that it is quite a substantial task to do so across all departments in government.
- Dedicated Workforce Strategy team at DfE in place since June, engaging with stakeholders (LA's, national orgs, providers), tasks with addressing the EY workforce challenges. I suggested a formal call for evidence to inform their work as they appeared keen to do something about the current change, but the sheer weight of information was challenging. The team must work on a cost-neutral basis (now expensive publicity etc). Establishing an expert advisory group. Agreed that any

information that they have that will influence our own Workforce Strategy would be shared if appropriate.

- Challenges around SEND and funding. No additional funding is available through DfE, funding consultation outcome should be in October with LA's to continue to make local funding decisions (base rate, SEND fund etc). DfE referred to online SEND training and liked what we had planned with the SENCO L3 training.
- Agreed to meet termly to maintain traction with decision-making and DfE engagement with Lancs at the senior level. The meeting would include DfE officers, LA officers and the EYBWG Chair.

The Working Group:

a) Acknowledged DfE visit.

6. Energy costs and Nursery Closures

Nurseries are facing increased energy, food and staffing costs, as well as struggling to recruit. The overall number of childcare providers in England dropped by around 4,000 between March 2021 and March 2022, the largest decline since 2016, according to figures from Ofsted.

One key expenditure element for the sector relates to increases in energy costs. 8 examples have been provided in the report.

Nurseries Closures

We have been informed that there have been 8 recent Nursery closures.

One was planned to be reopened but failed due to a business group going into administration.

Analysis of net nursery closures in recent years is provided in Appendix A.

- In the six months from 1 March 2022 to 1 September 2022, 74 net closures were recorded (2 new providers opened).
- In three-year from 1 March 2019 to 1 March 2022, 138 net closures were recorded (71 new providers have opened).

They have expressed views about challenging positions the early years sector found itself in. The discussion included further net nursery closures. Members have stated the issue with recruitment for minimum wage and how the nursery runs at half of the capacity that it is used to. Therefore, they cannot take more children to make up for the increased costs.

Mel Foster has stated that it is recognised that the whole county is sufficient this may not currently change but the team watches if the pattern of net closures stabilises or increases.

The working group members have raised the costs increases for all costs including food, gas/electricity, and industry rates. The cap introduced by the government still is not solving the issue the sector is facing.

Members have asked to find out if they could get relief from business rates to help them to cope. The discussion was raised about LCC writing again to local councils to ask them to provide business rate relief for Early Years settings.

The Working Group:

- b) Noted the report.**
- c) Discussed the issues with cost pressures.**

7. Education Partnership and Around the School and Settings (TASS)

Team Around the School and Settings, or TASS, is a collaborative way of working across services, schools and settings with children and young people.

The service is working in partnership to achieve the priorities of the education strategy. The Education Strategy, provided in Appendix A, sets out the aspirations for education in Lancashire but the context in which the strategy is delivered will shift year on year. For this reason, the Education Strategy will be supported by an annual delivery plan. A delivery plan is provided in Appendix B.

Sarah Gorst attended for this item as she has asked for feedback regarding the current Delivery Plan before the next half-term to be sent directly to her. TASS want to change the way they deliver and create improvement in its services and to ensure that early years are included as a key part in the plan.

The Working Group:

- a) Noted the Education Strategy and Delivery plan.**



Lancashire Education Strategy

2022 – 2025



Foreword



Jayne Rear

County Councillor Jayne Rear
Cabinet Member for
Education and Skills
Lancashire County Council

Lancashire is a large and wonderfully diverse county, with more than 177,000 pupils at 628 schools. Lancashire County Council is the fourth largest local authority in the country, with a plethora of opportunities and our fair share of challenges.

Lancashire County Council's vision is to help make Lancashire the best place to live, work, visit and prosper, and our new Education Strategy sets out how we intend to make that happen for our children and young people.

We have high aspirations for all our children, whatever their starting point. Access to quality learning from childhood through to adulthood enables children to thrive and develop the life skills that will support them into a productive and happy adulthood.

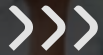
The Education Strategy for 2022-2025 sets out our ambition for our children and young people and how we intend to fulfil our responsibilities in providing them with everything they need to go forward and do fantastic things with their lives.

We are making it our mission to improve access, quality and outcomes for all children and families in our county in the next three years. By working with our partners, we will do all that we can to drive educational excellence and get all schools to, at the very least, an Ofsted judgement of 'good'.

We want to ensure sufficient childcare for all children who meet the criteria and school places for all children, as well as aligning services, schools and settings to address barriers to learning and recognise the individual needs of both children and communities to tailor the educational support we provide.



Our Partnership Vision



Children, young people and their families are safe, and achieve their full potential.

Lancashire Children, Young People and Families Partnership Vision



Education Strategy Mission Statement



'In Lancashire, we have high aspirations for all our children and young people, whatever their starting point. Access to a quality learning pathway, from childhood through to adulthood, enabling them to thrive and develop the life skills that will support them into a productive and happy adulthood, is at the root of our council ambition to ensure that children of all abilities do well in our schools and colleges gaining important skills and expertise for life.'



Our Purpose

There are key elements that the Local Authority has to do regarding education, and these are set out within The Education Act. In summary, the statutory duties can be summarised under three key headings:

Access

This relates to our 'sufficiency duty' where all children of statutory school age are entitled to education across a range of placements sufficient to meet their needs.

This duty relates not only to schools but also to the universal early years entitlements offer for all 3- and 4-year olds and our duty to have sufficient places for disadvantaged 2-year-olds and the 3 and 4-year-old extended 15 hours for working parents.

What this means is, the Local Authority must ensure that there are sufficient childcare and school places for all children meeting these criteria.

This duty also relates to special school places and access to alternative provision for children who either for medical or behavioural reasons are unable to access full-time education at times.



A photograph of two young school children, a boy and a girl, running and laughing joyfully. They are wearing white school shirts and dark ties. The boy is on the left, and the girl is on the right. They are outdoors, with a brick wall visible in the background.

Quality

The Local Authority has a duty to drive school improvement so that every school is a 'good' school. In this way, the Local Authority is referred to as the 'champion of the learner'.

The Local Authority also has a statutory duty to intervene where maintained schools are not performing, this means providing support to schools that are judged by Ofsted to be in 'special measures' or have 'serious weaknesses'. In Lancashire, there is a mixed economy of schools with academies, Multi Academy Trusts as well as maintained schools and faith schools.

This strategy adopts a 'status neutral' approach no matter what category of school the children are in and drives educational excellence across all Lancashire schools and settings, regardless of the 'type' or 'status'.

Outcomes

Within its capacity as 'champion of children' the Local Authority has a duty to support the best possible outcomes for all children and young people in Lancashire.

This strategy aims to bring together services, schools and settings to work together to address any barriers to learning.

Through the intelligent application of data, feedback, Quality Assurance/ audit processes, analysis of complaints, a needs-led approach will drive improvement by tailoring support to local priorities.

This approach is called 'warranted variation' where different needs and different communities are recognised so that support is tailored in response to that need.

Our improvement priorities

We will continue to focus on addressing the inequity of experience across the County by adopting a warranted variation locality approach. Using data intelligently, working with schools and settings, support will be targeted to ensure that there is a partnership approach to delivering 5 key priorities aligned to the 4 corporate priorities.

Five key priorities

Priority 1

Improve take-up and outcomes in early years

Priority 2

Further reduce exclusions, both permanent and suspensions

Priority 3

Address rising numbers of Elective Home Education (EHE) where this is not in the best interests of the child

Priority 4

Improve outcomes for vulnerable groups including those eligible for Free School Meals, Children In Need, children with a Care Plan, and Children Looked After, as well as those with SEN support and those with an EHCP

Priority 5

Increase the number of children and young people in Education, Employment or Training (EET)



Our Corporate Priorities 2021 - 2025

Our Vision

Here at Lancashire County Council we are helping you to make Lancashire the best place to live, work, visit and prosper.

Our Values

Supportive, Innovative, Respectful, Collaborative.

Our Partnerships

Through collaboration with partners and the sharing of ideas, assets, skills and knowledge, we will create a future for Lancashire that better meets all our needs.

Our Communities

We value local communities and will help them to provide care and support to their families, friends, neighbours and colleagues.

Our Accountability

We will ensure good governance, strong performance management, prudent financial control and transparent decision making for the taxpayer.



DELIVERING BETTER SERVICES

- Provide services that are effective, efficient and appropriate to local circumstances.
- Improve services by changing the way we do things.
- Help people and families live healthier lifestyles and enjoy a better quality of life.



CARING FOR THE VULNERABLE

- Protect, safeguard, support and enable the most vulnerable residents in our society.
- Challenge and reduce areas of inequality and provide opportunity for all.
- Ensure children of all abilities do well in our schools and colleges, gaining important skills and expertise for life.



PROTECTING OUR ENVIRONMENT

- Lead on environmental improvement schemes and renewable energy initiatives.
- Work with businesses and communities on flood prevention, decarbonisation projects and climate change resilience.
- Promote more recycling and better waste management.



SUPPORTING ECONOMIC GROWTH

- Develop and build effective infrastructure and transport networks, to help people and businesses connect and grow.
- Secure inward investment, to boost and level up the county.
- Invest in skills and innovation, to secure economic growth and maximise Lancashire's potential.

Seven Pillars

There are seven pillars which make clear the interdependencies across parallel pieces of work that will help to drive a joined-up approach to education in Lancashire. These seven pillars underpin the Education Strategy and have their own aims and objectives to support the delivery of this strategy.

The seven pillars are:



Multi-Agency Early Help

Early Years

SEND Improvement

Alternative Provision

School Effectiveness

School Place Planning

Preparation for Adulthood

What will success look like?

Locality gaps and underperformance will be addressed through strengthening local area prioritisation and planning in relation to school improvement and outcomes.

Governors are confident that Education Improvement and Governor Services are supported and have effective development opportunities to ensure strong and robust leadership and accountability across schools and settings.

Improved family engagement in learning will be achieved through Team Around the School and Setting approach to support early years uptake and learning.

Parents are confident that local mainstream schools are identifying and meeting their children's needs through the early identification of SEND and ensuring timely access to relevant support and intervention.



What will success look like?

Commercial services to schools provide a coherent traded offer which reflects the changing needs of schools and reflect increased academisation.

The prevalence of pupils from vulnerable groups suspended or excluded will be reduced.

The number of pupils who are suspended or excluded will reduce through the review and development of inclusion hubs and specialist support/ Alternative Provision outreach.

Families new to Lancashire report that they are supported in making a positive start to their life here to gain a sense of belonging and the opportunity to settle.

How will the Education Strategy deliver improvement?



Working in collaboration, the services within the Council combined with the services and partners within the Team Around the School and Settings (TASS) locality groups will listen to the voice of children, young people and their families in order to deliver the aspirations articulated within this strategy and realise the shared ambition for all children and young people set out within the vision statement.

The Education Strategy sets out the aspirations for education in Lancashire but the context in which the strategy is delivered will shift year on year. For this reason, the Education Strategy will be supported by an annual delivery plan. The priorities within the annual delivery plan will be informed by data, local intelligence and the lived experiences of children young people and their families. They will be agreed with sector representatives across early years, primary, secondary, post 16 and special schools at the Lancashire Education Partnership Group.

The Education Scrutiny Committee will receive a copy of the delivery plan at least annually to scrutinise and challenge performance against the targets agreed at the Lancashire Education Partnership Group.

The Education Strategy itself will be reviewed on a three yearly basis and so the term of this strategy is from 2022 to 2025.





Our pledge to
ensure all our
children get the
right support, in
the right place,
at the right time.

>>>



- We will produce an annual delivery plan identifying clear aspirational yet achievable outcomes, measures, and timeframes.
- Our annual plan will identify how we will work to create the better future through:
 - o Strong leadership, management and governance structures across the partnership that will drive the work of the Education Strategy forward providing quality and assurance
 - o Ensuring stakeholders are fully engaged and involved, and interests taken into consideration
 - o Continuing to build on our strong teams and structures
 - o Developing policies, practices and processes that reflect the changing needs of our communities, guided by data, evidence and the experiences of children, young people, and their families
 - o Working together to develop systems and improve our use of digital tools to shape the way we work together to share information to improve outcomes





Lancashire Education Strategy

2022 – 2025



Lancashire Education Strategy Delivery and Improvement Plan 2022 – 2023



Introduction from Julie Bell, Director of Education, Culture and Skills

Lancashire County Councils vision is to make Lancashire the best place live, work, visit and prosper.

We want all our children, young people and their families to be safe and achieve their full potential. Our new Education Strategy sets out how we intend to make that happen for all our children and young people – you can read more here: [Lancashire Education Strategy 2022-2025 - Lancashire County Council](#)

Lancashire's Education Strategy is vital in improving outcomes and providing the best possible educational opportunities for all children and young people in our county. We want to make sure that, whatever their age, starting point or ambitions, every child and young person in Lancashire gets **the right support, in the right place, at the right time.**

We have created a Delivery and Improvement Plan to hold us accountable for our actions, showing how and why we will deliver on our priorities and evidencing outcomes and impact.

The Plan is aligned with 'Opportunities for all: strong schools with great teachers for your children', the Government's white paper demonstrating how our education system can deliver on the governmental priority to level up. It includes our statutory duties as set out within The Education Act, outlines five priorities for the county and is underpinned by seven pillars that clearly demonstrate the shared responsibilities across partner agencies that will help drive the joined-up approach to education in Lancashire.

We will produce an annual report that will reflect our progress and continuously review our priorities through our Team Around the School and Settings, or TASS, partnership ways of working.

TASS is a key element in helping us achieve our priorities; it drives our partnership ways of working and will involve us working with our local partners to deliver on the overall Education Strategy. There is already a great deal of excellent partnership working taking place across the county and I look forward to continuing to work closely with all partners to develop this way of working and identify any patterns or issues that need addressing so that we can hit the ground running and start to see results.



Julie Bell

Director of Education, Culture and Skills
Lancashire County Council

Education Delivery and Improvement Plan 2022-2023



The **Lancashire Education Delivery and Improvement Plan** is the overarching document that aims to progress across the county and ultimately to ensure Lancashire is a great place for children and young people to learn and grow up. It captures five outcome priorities for the coming year, and provides a focus on how we want to improve to provide excellent education provision for all Lancashire's children and young people.

There are seven pillars which make clear the interdependencies across parallel pieces of work that will help to drive a joined-up approach to education in Lancashire. While not all pillars have a specific strategy associated to them, those areas remain a priority in identifying gaps. The objectives across the priorities are interlinked across existing programmes of work and are implemented through the individual delivery plans.

The plan sets out the key issues for delivering services in support of the Lancashire Education Strategy vision and priorities, provides a focus on performance improvement and describes any service specific risks that may impact on the delivery. Through monitoring and analysing performance indicators (PIs) over time, we will identify trends and highlight areas where we need to make improvements to meet our priorities. We will be guided by data and evidence, and ensure the experiences of children, young people and their families are at the heart of all we do.

Regular update/highlight reports will be produced, and a full end of year progress report including actions, risks and PIs will be submitted to the Education Scrutiny Committee and Lancashire Education Partnership Board to scrutinise and challenge performance.

Working with Education Providers

Education providers and schools have always played a critical role in children and young people's lives. The levels of day-to-day contact this role entails and the key role supporting parents as well as children, have been highlighted and recognised even more so following the pandemic.

The need to support schools in their roles as educators and supporters of families is recognised through the implementation of Team Around the School and Settings (TASS) partnership ways of working. The TASS approach is a mechanism for agencies, key stakeholders, partners, and communities to come together to improve outcomes for children and young people. Everyone working with children and young people in Lancashire or are involved in their care or education is part of TASS.

Working consistently at a partnership level during the pandemic has shown the how a range of agencies can come together in support of delivering help early and delivering the help needed, rather than building complex pictures of complex families in need through multi-faceted assessment tools. In supporting schools in their roles as educators and supporters of families, the Lancashire County Council Children, Young People and Families Partnership is committed to build on this and continue to develop out partnership ways of working.

This Delivery and Improvement Plan is Lancashire County Council's commitment to supporting schools, settings and partner agencies to build on TASS ways of working and embed strength-based practice. The Plan aims to:

- maintain line of sight of both LCC and wider team practice
- ensure the work force is recruited, retained, and supported
- ensure common high standards of practice
- ensure both innovation and warranted variation is managed collectively.

The 7 pillars support the delivery of the Education Delivery and Improvement Plan and show the interdependencies across parallel pieces of work. Each of these areas of work underpin the Education Strategy and will help to drive a joined-up approach to education in Lancashire. These are:



Each pillar has its own individual service area plans identifying aims and objectives that contribute to delivering the priorities of the strategy.

Each service plan details:

- The activities and deliverables to be completed
- The performance indicators that will measure progress
- The outcome and impact to be achieved through completing the activity
- The officers leading the activities and timeframes for completion

Although plans focus on individual service areas, they capture wider partnerships and recognise that Lancashire County Council is committed to continuing to build stronger links with early years settings, schools, post-16 provision and wider services supporting children and young people.

Lancashire's Education Strategy priorities

Education has the power to change people's lives, which is why in Lancashire we are working together to make learning better for all our children and young people and improve outcomes for all, no matter what their starting point.

The Delivery and Improvement Plan recognises Lancashire County Council's role as champion for all of Lancashire's children, young people, and their families within a constantly evolving education environment.


The plan identifies five high level outcomes for children and young people, along with key actions that will be taken to support the delivery of these outcomes and the measures used to track progress.


We will continue to focus on addressing the inequity of experience across the county by adopting a warranted variation locality approach. Using data intelligently and working with schools and settings, support will be targeted to ensure that there is a partnership approach to delivering 5 key priorities.


In building on these priorities for Lancashire's children and young people, we are preparing them not just to thrive and succeed in later life but also to actively participate in their local communities.


EDUCATION STRATEGY PRIORITIES

- 

1. Improve take up and outcomes in early years
- 

2. Further reducing exclusions, both permanent and exclusions
- 

3. Addressing rising numbers of Elective Home Education (EHE) where not in the best interest of the child
- 

4. Improve outcomes for vulnerable groups
- 

5. Increase numbers of children and young people in education, employment and training (EET)

Recurring themes



Strong and effective leadership

We will promote collaborative ways of working to ensure strong leadership, management and governance structures are in place across the partnership. Increasingly, it will be appropriate for agencies other than the council to lead, we will act as supportive partners to help broker appropriate collaboration, driving the work of the Education Strategy forward and providing quality and assurance.

Partnership working

We will implement and adopt Team Around the School and Settings (TASS) to continue to build our strong teams and structures through collaborative partnerships with a continued focus on improvement. This will work at all levels and ensure all stakeholders are fully engaged and involved, taking interests into consideration. We will actively listen to the voice of children, young people and their families in order to ensure they consistently remain at the heart of all we do.

Driving improvement

We will ensure all services will continue to have a focus on improvement. With continuing pressure on budgets for schools and the local authority, we will ensure that resources are organised in a way to maximise their impact. Everything we do will be informed by data, local intelligence and the lived experiences of children, young people and their families. We will use this information to work together across the partnership to review and develop policies, practices and processes that are effective and reflect the changing needs of our communities.

Priority	Action/Activity	Delivery via	Lead
Improve take up and outcomes in early years	<p>Develop pathways that enable all children and young people to engage with the curriculum.</p> <p>Support and engaging with families.</p> <p>Identify local priorities informed by local intelligence.</p> <p>Ensure effective transition from the early years into statutory education.</p>	<p>Best Start in Life Board</p> <p>Team Around the School and Settings Partnership Group</p> <p>Family Hubs Steering Group</p> <p>Multi Agency Early Help - CFW Service Strategy and Plan 2022-2025</p>	<p>Chair of Best Start In Life - Sakthi Karunanithi, Director Public Health and Wellbeing,</p> <p>Chair of Team Around the School and Settings Partnership Group – Dave Carr, Director of Policy, Commissioning and Children's Health.</p> <p>Chair of Family Hubs Steering Group – Dave Carr, Director of Policy, Commissioning and Children's Health</p> <p>Head of Service Early Help, Kathy Ashworth</p>
Further reducing exclusions, both permanent and exclusions	<p>Ensure full time suitable education for all children and young people.</p> <p>Reducing exclusions, suspensions.</p> <p>Tackle Persistent Absence.</p> <p>Improving attendance of children from vulnerable groups.</p>	<p>Lancashire Education Partnership Board (LEPB)</p> <p>SEND Partnership Board / SEND Plan 2021-2023</p> <p>Alternative Provisions Strategic Group</p> <p>Team Around the School and Settings Partnership Group</p> <p>Family Hubs Steering Group</p> <p>Multi Agency Early Help - CFW Service Strategy and Plan 2022-2025</p>	<p>Chair of LEPB - Tina Wilkinson, Head Teacher St Andrews</p> <p>Chair of SEND Partnership Board – TBC</p> <p>Chair of Alternative Provision Strategic Group – Julie Bell, Director Education, Skills and Culture</p> <p>Chair of Team Around the School and Settings Partnership Group – Dave Carr, Director of Policy, Commissioning and Children's Health.</p> <p>Chair of Family Hubs Steering Group – Dave Carr, Director of Policy, Commissioning and Children's Health</p> <p>Head of Service Early Help, Kathy Ashworth</p>
Addressing rising numbers of Elective Home Education (EHE) where not in the best interest of the child	<p>Reduce Elective Home Education (EHE) where this is not in the best interests of the child.</p> <p>Reduce percentage of children with EHCP in Elective Home Education</p>	<p>Lancashire Education Partnership Board (LEPB)</p> <p>SEND Partnership Board</p> <p>SEND Plan 2021-2023</p> <p>Keeping Children Safe Group</p> <p>Team Around the School and Settings Partnership Group</p> <p>Family Hubs Steering Group</p> <p>Multi Agency Early Help - CFW Service Strategy and Plan 2022-2025</p>	<p>Chair of LEPB - Tina Wilkinson, Head Teacher St Andrews</p> <p>Chair of SEND Partnership Board – TBC</p> <p>Chair of Keeping Children Safe Group – Louise Anderson, Director of Children's Social Care</p> <p>Chair of Team Around the School and Settings Partnership Group – Dave Carr, Director of Policy, Commissioning and Children's Health.</p> <p>Chair of Family Hubs Steering Group – Dave Carr, Director of Policy, Commissioning and Children's Health</p> <p>Head of Service Early Help, Kathy Ashworth</p>

Priority	Action/Activity	Delivery via	Lead
Improving outcomes for vulnerable groups	<p>Champion the most vulnerable in our communities by further developing an inclusion agenda supported by all services, agencies, and wider stakeholders.</p> <p>Align resources to need (warranted variation).</p> <p>Robust Early Help Assessment processes.</p> <p>Ensure timely early help to unblock barriers to learning.</p> <p>Build trust and improve communication across all the key stakeholders with a responsibility for supporting positive outcomes for children and young people.</p> <p>Provide continuity at key transition points.</p> <p>Effectively track and monitor progress by vulnerable group.</p>	<p>Lancashire Children Young People and Families Partnership</p> <p>Lancashire Education Partnership Board (LEPB)</p> <p>SEND Partnership Board / SEND Plan 2021-2023</p> <p>Keeping Children Safe Group</p> <p>Team Around the School and Settings Partnership Group</p> <p>Family Hubs Steering Group</p> <p>Multi Agency Early Help - CFW Service Strategy and Plan 2022-2025</p>	<p>Chair of Lancashire Children Young People and Families Partnership – Edwina Grant (OBE), Executive Director of Education and Children's Services</p> <p>Chair of LEPB - Tina Wilkinson, Head Teacher St Andrews</p> <p>Chair of SEND Partnership Board – TBC</p> <p>Chair of Keeping Children Safe Group – Louise Anderson, Director of Children's Social Care</p> <p>Chair of Team Around the School and Settings Partnership Group – Dave Carr, Director of Policy, Commissioning and Children's Health.</p> <p>Chair of Family Hubs Steering Group – Dave Carr, Director of Policy, Commissioning and Children's Health</p> <p>Head of Service Early Help, Kathy Ashworth</p>
Increasing the numbers of children and young people in education, employment and training (EET)	<p>Support all young people to develop the skills to progress in to training and work opportunities.</p> <p>Work with employers to ensure opportunities for work and employment are in place including apprenticeships.</p> <p>Prepare young people for adulthood.</p> <p>Meet our high expectations for all children and young people, whatever their background or circumstances.</p>	<p>Lancashire Children Young People and Families Partnership</p> <p>Lancashire Education Partnership Board (LEPB)</p> <p>SEND Partnership Board / SEND Plan 2021-2023</p> <p>Multi Agency Early Help - CFW Service Strategy and Plan 2022-2025</p>	<p>Chair of Lancashire Children Young People and Families Partnership – Edwina Grant (OBE), Executive Director of Education and Children's Services</p> <p>Chair of LEPB - Tina Wilkinson, Head Teacher St Andrews</p> <p>Chair of SEND Partnership Board –TBC</p> <p>Head of Service Early Help, Kathy Ashworth</p>

Looking ahead

Our ambition is to ensure a partnership, sector-led approach across education in Lancashire. As the County Council, we will adopt the role as facilitators of change, empowering local education leaders to shape and develop this strategy through embedding TASS ways of working. Building on our partnerships and working together, we will continue to make a positive difference to the lives of all our children and young people in Lancashire.

In shaping this delivery and improvement plan, we have been guided by feedback from our partners. This feedback has led us to having a focus on **defining the key features of a new operating model which identifies what a successful set of support services look like** so that all children, young people and parent carers can benefit from an overall education system that supports growing up well in Lancashire.

Therefore, our plan for the year will be embedded around two programmes, of which we can report on from various angles.

- **The Alternative Provision/Elective Home Education/Exclusions Programme. Through this we will:**
 - Assess our Alternative Provision arrangements to seek to collaborate in different ways in order to reduce exclusions and support parents whose children are missing out on opportunities to access education
 - Focus on getting the right balance and having the right setting in terms of education placements for our most vulnerable children
 - Support parents who chose to Electively Home Educate to make the best decisions for their children
- **The Academisation and Commercialisation Programme. Through this we will:**
 - Explore the opportunities that exist within the new legislative situation or context that can improve the outcomes for children and young people and develop a partnership, system wide approach to creating change across education
 - Work together with partners to agree ways to optimise opportunities to ensure children do not miss out

We will continuously track progress of the delivery and improvement plan outlining the key business measures used to measure the impact of the strategy across its five priority areas with a spotlight upon priority 2, 3 and 4. Alongside these measures, we will produce an annual report and review the strategy as we work towards achieving our priorities.

In order to achieve this, we will continue to provide opportunities for partners to influence the strategy throughout its implementation and ask partners to help us identify opportunities, review the strategy's performance and contribute towards its development.

Lancashire Schools Forum Meeting Schedule 2022/23

Autumn Term

Meeting	Day	Date	Time	Venue
Schools Forum Induction	Thursday	15-Sep-22	10:00 – 13.00	Savoy Suite
Schools Block Working Group	Tuesday	20-Sep-22	10:00 – 13.00	Savoy Suite
High Needs Block Working Group	Tuesday	27-Sep-22	10:00 – 13.00	Savoy Suite
Early Years Block Working Group	Tuesday	04-Oct-22	13.00 – 16.00	Savoy Suite
Lancashire Schools Forum	Tuesday	18-Oct-22	10:00 – 13.00	Savoy Suite
High Needs Block Working Group	Tuesday	29-Nov-22	10:00 - 13.00	Savoy Suite
Early Years Block Working Group	Thursday	01-Dec-22	13.00 – 16.00	Savoy Suite
Schools Block Working Group	Tuesday	06-Dec-22	10:00 – 13.00	Savoy Suite

Spring Term

Meeting	Day	Date	Time	
Chairman's Working Group	Tuesday	10-Jan-23	10:00 – 13.00	Savoy Suite
Lancashire Schools Forum	Thursday	12-Jan-23	10:00 – 13.00	Savoy Suite
High Needs Block Working Group	Thursday	02-Mar-23	10:00 – 13.00	Savoy Suite
Early Years Block Working Group	Tuesday	07-Mar-23	13.00 – 16.00	Savoy Suite
Schools Block Working Group	Thursday	09-Mar-23	10:00 – 13.00	Savoy Suite
Lancashire Schools Forum	Thursday	16-Mar-23	10:00 – 13.00	Savoy Suite

Summer Term

Meeting	Day	Date	Time	
Early Years Block Working Group	Thursday	08-Jun-23	13.00 – 16.00	Savoy Suite
High Needs Block Working Group	Tuesday	13-Jun-23	10:00 – 13.00	Savoy Suite
Schools Block Working Group	Tuesday	20-Jun-23	10:00 – 13.00	Savoy Suite
Lancashire Schools Forum	Tuesday	04-Jul-23	10:00 – 13.00	Savoy Suite

All meetings are scheduled to take place at The Exchange, County Hall but may be conducted virtually