



Surrey Schools Forum Minutes of Meeting

Tuesday 7 December 2021 1.00pm Virtual Meeting on TEAMS
Approved by the Forum at their meeting on 14 January 2022

Present

Chair

Rhona Barnfield Howard of Effingham School Academy member

Joint Vice Chairs

Kate Keane Ewell Grove Primary Primary Head
Justin Price Freemantles School Special school head

Other school and academy members:

| | | |
|--------------------------|--|-------------------------|
| Donna Harwood-Duffy | Dorking Nursery | Maintained nursery head |
| Katie Aldred | Bagshot Infant | Primary Head |
| Susan Chrysanthou | Furzefield Primary | Primary Head |
| Clare McConnell | Bisley CE Primary | Primary Head |
| Zoe Johnson-Walker | The Winston Churchill School | Secondary Head |
| Geoffrey Hackett | Burpham Primary | Primary governor |
| Fred Greaves | Oakwood School | Secondary governor |
| Lisa Kent | Manor Mead and Walton Leigh Schools | Special governor |
| Paul Jackson | NW secondary PRU | PRU representative |
| Matthew Armstrong-Harris | Rodborough | Academy member |
| Sir Andrew Carter | South Farnham Primary | Academy member |
| Elaine Cooper | SWAN academy trust | Academy member |
| Jo Hastings | Ottershaw Infant and Junior | Academy member |
| Karyn Hing | Westfield School | Academy member |
| Paul Kinder | Warlingham School | Academy member |
| Sarah Kober | Darley Dene | Academy representative |
| Jack Mayhew | Athena/GEP | Academy member |
| Kerry Oakley | Carrington School | Academy member |
| David Euridge | Reigate Valley/Wey Valley | AP academy member |
| Neil Miller | Bramley Oak Academy | Special academy member |

Non school members

Matthew Rixson Guildford Diocese (Church of England)
Joe Dunne Arundel and Brighton Diocese (RC)
Folasade Afolabi Unions: Education Joint Committee
Benedicte Symcox Family Voice Surrey

Local Authority Officers

Liz Mills (LM) Director–Education and Lifelong Learning
Jane Winterbone (JW) Assistant Director (Education)
Eamonn Gilbert (EG) Assistant Director (Commissioning)
Sandra Morrison (SM) Assistant Director (Inclusion and Additional Needs)SE
Carol Savedra (CS) Head of Commissioning-SEND, Education, corporate
parenting
Louise Lawson (LL) Deputy Strategic Finance Business Partner

David Green (DG) Senior Finance Business Partner (Schools Funding)
Maria Dawes, Schools Alliance for Excellence, attended to contribute to discussions on item 10.

1 Election of Chair and Vice Chair

The Chair and the two Vice Chairs had been nominated unopposed to continue in office and were willing to continue. Therefore, all were reappointed for a further year.

2 Welcome, Introductions and Apologies for Absence

Apologies:

| | | |
|--------------------|-----------------------------------|------------------|
| Steph Neale | St Pauls Catholic Primary | Primary governor |
| Christine Ricketts | Post 16 provider | |
| Tracy Baker | Unions: Education Joint Committee | |

3 Declarations of interest (where not self-evident)

The Chair reminded members of their duty to look at the issues under consideration from the point of view of all children, not just those they represented on the Forum and to take a strategic view considering all schools. A draft register of interests had been circulated. DG had since received four more returns. The Chair urged all members to submit their entries. The register would be recirculated for the next meeting and it was hoped it would streamline the declaration process.

Andrew Carter noted that many schools had received funds from SAFE at some time.

4 Minutes of previous meetings on 7 October 2021 and 1 November 2021

The minutes of both meetings were agreed as accurate. There were no matters arising which were not already on the agenda for the meeting.

5 Update on DFE announcements and consultations Spending review

The October spending review had allocated an extra £1.7bn nationally for schools and high needs in 2022/23, plus a further £1.5bn increase in each of 2023/24 and 2024/25. No further information was yet available as to how these sums would be allocated. Early years hourly funding rates to local authorities were to increase by 21p for 2-year-olds and by 17p for 3–4-year-olds in 2022/23 (note the increase in the hourly rate for providers may be lower).

School improvement funding consultation

The LA had responded to the recent DfE consultation on changes to school improvement funding and that response had already been shared with Forum members. JW noted that the timing of the consultation and of the proposed changes had been difficult, leaving little time to consider alternative arrangements if existing school improvement funding was withdrawn. The LA response had emphasised that the LA school improvement role was about pre-empting the need for intervention and not just exercising intervention powers. The timing of the proposals had been a concern nationally. There were also

concerns that the speed of the proposed change potentially placed maintained schools at risk.

Members expressed concern that the consultation potentially set aside decisions previously reached by the Forum for 2022/23 through existing processes.

JW noted that the DfE proposals meant that there could no longer be a phase specific choice on retaining funding for additional school improvement purposes. LM advised that the County Councils Network had also lobbied against the proposal.

The Chair noted that the consultation had now closed, but she suggested that it might still be worthwhile to raise concerns via professional associations, which were well placed to influence government.

6 Update on Cabinet Schools Budget report (30 November)

LM reported that the Cabinet had discussed the report fully and had approved the recommendations, including full delivery of the minimum per pupil level, the formula funding recommendations for schools and early years and the proposed transfer of funds from schools' block to high needs block subject to Schools Forum approval. The Cabinet had also agreed the proposed changes to special schools funding. Final decisions had been delegated to the Director.

7 Review of work carried out by Inclusion Innovation Fund working group and resulting recommendations

The Chair recalled that a proposal to transfer funding from the schools' block to the high needs block to support inclusion had been included in the September consultation paper and discussed at the 7 October meeting. The Forum had supported the principle by 11-7, but the vote on an actual transfer of funds in 2022/23 had been much closer. As Chair, she had decided to regard the vote as indicative and had suggested that a working group looked at the proposals in more detail, including examining governance models and providing more detail around the focus of any proposed spending. LM acknowledged that members of that group had given generously of their time. The group had reached an understanding of strengths and opportunities and issues to be resolved and addressed.

SM reported that the working group had met three times, and had considered:

- Identification of a preferred governance model
- How governance groups might be constituted locally
- The types of activity which might be supported by the fund
- Data requirements and information to support the evaluation of impact.

The group had considered strengths, weaknesses, opportunities and threats of the proposal and the "SWOT" analysis had been shared with primary and secondary phase council leads. Their key concerns had included governance, the short timescales for implementation and the financial impact on small schools.

Cabinet had agreed to ringfence any underspend on transferred funds for the schools' block.

The proposals offered an opportunity to bring change across the system and to do things differently in order to make schools more inclusive.

The group had seen a cross phase approach as important.

The group had emphasised the need for greater understanding of the resources currently available and their impact and to build on the work of the inclusion round table and the team around the school pilot. There was much work to be done to map existing resources and work and their impact on the ambition for schools to be more inclusive.

It was important that the distribution of funding was effective and benefited young people, that the activities, leadership and governance arrangements were school led and that they were seen to be transparent and that changes were sustainable and promoted fair access. The working group had proposed locality governance boards plus a central board with an independent Chair to co-ordinate. All would be largely school led and the council would only have a small role. The locality boards could be chaired by a school leader and include headteachers from all phases, and Schools Forum representatives. Associate members could be included in local groups to bring in specific expertise.

There could be a specific countywide objective (autism had been suggested) or there could be individual locality foci (eg transition). Further discussions were needed on this.

The overall aim was greater transparency and consistency of inclusion. The main risks were seen as governance, lack of transparency, unwillingness of some schools to engage, and funding being lost because of lack of development capacity.

The working group had unanimously agreed that the proposal should be recommended to Schools' Forum for implementation, but had suggested a further meeting of the group in March to make a final decision as to whether to implement the proposal in 2022/23.

LM noted that the group had focused its attention on solutions to identified issues and emphasised the need to continue to work at a similar pace. It was important that unspent funds should be carried forward for the same purposes, and Cabinet had agreed that. The proposed solutions were very much school led.

Jack Mayhew commented that the working group process had been very rewarding and developmental. It would be up to school leaders to decide whether they were comfortable with the proposals, but they would provide school led resources which would remain controlled by schools, to utilise either as individual schools or as networks. The aim was to give resources and encouragement to schools to collaborate locally to improve inclusion. He hoped that development could continue but, if not, the funding would be returned to schools.

Other working group members had been inspired by the way discussions had progressed, but noted that colleagues outside the group had had concerns that they had not progressed far enough. Slow progress was a risk. One member

suggested that exhaustion among school leaders, following the additional challenges of the past year, might slow down progress.

It was difficult to generalise as to the funding loss to individual schools' budgets, for example schools on the minimum per pupil level (MPPL) would lose nothing, schools on minimum funding guarantee would lose around 0.5% of budget, and a loss of 0.9% of budget was typical of schools which were not on MPPL or on minimum funding guarantee. School budgets would generally increase in 2022/23 (subject to pupil numbers). It was noted that a large secondary school might lose £35,000 for the proposed transfer.

One member noted that an 0.5% reduction meant around £20 per pupil and thought a transfer of that order needed further consideration. He thought the proposals were a cultural move in the wrong direction and expressed concern that some of the funding would be spent on running or administration costs. He saw the proposed priorities identified by the group as statutory functions of the LA. LM responded that the funding would go into schools to support inclusion. The member suggested that funding was being withdrawn from all schools in order to support inclusion in some, that existing inclusion work in individual schools might need to be reduced to reflect the loss of funding, and that some schools didn't show up as inclusive in the statistics because they managed need well. He suggested that the proposals might mean improvements in the least inclusive schools but would discourage the most inclusive schools, rather than encouraging all schools towards the highest standards. Another member suggested that bespoke provision to retain individual pupils in school might be lost. The Chair reminded members that the funding was not being lost to schools.

The Chair noted that the proposals were intended to address current inconsistency in inclusion and thus to help all schools. LM suggested that there had been a variation in consistency and transparency over inclusion, for example a wide disparity in the incidence of Education Health Care Plans. Sharing of existing good practice on inclusion would reduce the burden on those schools which have typically been most inclusive. Members asked what the definition of an inclusive school was.

One member asked whether an estimate had been made of management costs. LM advised that the LA had agreed to facilitate the proposal in its first year, possibly including finding a small sum to pay for an independent Chair and providing officer support. Longer term running costs would need to be considered. The aim was to build capacity to support sustainable change.

One member noted that even though schools were seeing increased funding they faced inflation of 4%. The sums involved could mean some schools losing a member of staff. She asked for further consideration of the impact on individual schools. Another member welcomed the chance to try something different, and recognised that some work was best done collaboratively, but suggested that schools couldn't stop individual areas of work in the hope that they would be done jointly in future. Other members noted the difficulty for schools of explaining a possible reduction in staff to fund a collective inclusion fund without a clear idea of what that fund would be used for. It was recognised that the sums involved were a lot to ask of colleagues.

LM emphasised that while the LA supported the proposed transfer of funds it had not been an LA proposal. It was important to build on the understanding developed by the working group and not to lose it.

The Chair reminded members that the proposal was not for a standard model, but was about cultural change, and schools working together on projects which would have a greater impact than individual schools could have alone. She noted that she had been involved in many initiatives and that getting colleagues to collaborate to find solutions had often worked.

The Family Voice rep suggested that families would welcome even a small improvement in inclusive practice but didn't want to lose good practice where it existed. Families reported inconsistency in inclusive practice and parents of children with additional needs could feel they were seen as a problem. A focus on countywide inclusion would be important. Outcome measures would need to be carefully chosen, eg targeting fewer EHCPs could drive exclusions. She also saw the proposed governance model as top heavy and potentially costly.

One member noted that the working group had been very productive and asked whether it would be possible for innovation work to continue even if the funding transfer was not agreed. Schools could still collaborate and learn from one another without spending £3.6m to do it. Culture and professional training were central to it. Members also noted the need to understand any overlap with other initiatives eg team around the school.

EG suggested that sharing resources among schools created economies of scale but needed some resources to start it.

Jack Mayhew suggested that while most individual schools were doing a good job on inclusion, some avoided the issue. Some increase in funding was expected in 2022/23, but there might not be a similar opportunity after that. Peer to peer challenge locally would eventually change the culture of non-inclusive schools.

Justin Price expressed his willingness as a special school headteacher to spend more time supporting inclusion in Surrey mainstream schools. Every school can always improve, and Surrey needed to do something different on autism and SEND.

Officers advised that this was not specifically a formula funding issue and therefore any member could vote.

The Forum voted 16-5 (with four recorded abstentions) NOT to approve the proposed transfer of funding to the high needs block in 2022/23.

The Chair suggested that the working group should reconvene to consider what could be done to improve inclusion without additional funding. She noted that there had been strong support for the principle (of collaborative work on inclusion). It was agreed that the working group should reconvene to discuss what work on improving inclusion could be taken forward without funding and whether a proposal for a transfer of funding should be developed for 2023/24.

8 Dedicated Schools Grant (DSG) management plan

Further information would be circulated after the meeting.

The reference in section 15 to potentially “repurposing” funding between Dedicated Schools Grant blocks was just a statement of the possible.

9 Special schools banding review

Cabinet had ratified the proposed changes (as presented to Schools Forum on 1 Nov) on 30 November. EG had had discussions with Family Voice. The proposals had been discussed at special schools’ phase council on 3 December. Only one school had not agreed to the proposal. That school wanted to retain the existing arrangements for another year. EG had indicated to the school that that would be acceptable. The proposed changes would be implemented for all other schools. Pupils currently on IPSB funding would be transferred to the new arrangements in September 2022, together with new pupils and pupils at key stage transfer.

10 Approval of centrally managed Schools Block and central services levy proposals for 2022/23

Centrally managed schools’ budget (CSSB)

DG explained that the CSSB covered a range of statutory services for all schools (both maintained and academies) and is funding which is outside the NFF and mostly has never been in school budgets. Schools Forum approval is required to individual lines. The table showed budgets for 2021/22 and proposed budgets for 2022/23. Little change was proposed. IT costs had been scaled back to match the estimated budget, but final October census pupil numbers suggested funding approximately £35,000 higher, so DG proposed to add that back to the IT budget.

The Forum approved the proposed centrally managed Schools Budget.

“Central services levy” budget (i.e., costs deducted from budgets of maintained primary, secondary and special schools and pupil referral units)

This item was considered in three parts.

Services already funded from the central services levy

Budgets for 2021/22 and proposed budgets for 2022/23 were set out in Annex B of the paper. The services to be covered were largely unchanged and the proposed deduction of £35.98 per pupil/place was unchanged from 2021/22.

Representatives of maintained schools approved the proposed deduction of £35.98 per pupil for these services by 9-0.

Statutory school improvement services

An additional deduction of £6.50 per pupil was requested to fund the shortfall from the reduction in school improvement grant if the DfE consultation proposals were implemented (see item 5). The request was for one year only, but the LA

reserved the right to ask for a deduction in following years. The LA had the right to appeal to the Secretary of State if the Forum refused the request.

One member asked for an assurance that none of the funding would be spent on academies. JW advised that SAFE's contract for statutory work did not include academies.

Members noted that It wasn't clear whether full academisation was current DfE policy. However, even if it was still the DfE intention that all maintained schools should convert to academies, it would take time to reach that point. They questioned whether DfE had a sustainable school improvement policy for maintained schools.

Members noted that good schools were supposed to take responsibility for their own school improvement, therefore were those schools paying twice by contributing to the proposed deduction? They also expressed concern that as more schools became academies the cost of school improvement for maintained schools would be shared among fewer schools.

LM suggested that Surrey had been more proactive than some other LAs in risk assessing maintained schools.

An email from a maintained secondary headteacher was shared, expressing concerns about the voting arrangements and suggesting that maintained primary schools were overrepresented. Officers explained that the ratio of maintained primary and secondary representatives on the Forum was (and was required to be) linked to pupil numbers. There were in fact two maintained secondary school representatives (one headteacher and one governor).

Maria Dawes, on behalf of SAFE, advised that the statutory budget had recently supported two secondary schools and a PRU. It did not just support primary schools. If the budget was reduced, work would have to be restricted to those schools in highest need. 50% of Surrey schools were still maintained and even if they were all to convert to academies this would take some time and school improvement support would still be required in the meantime. Funding for statutory school improvement was ringfenced from other work. The recent DfE consultation had preceded a White Paper on school improvement, expected in March. A step-down plan for statutory school improvement was being developed in case it was needed. Schools needed to work together as a community.

One member argued that the LA should give the funding to local schools and they could then support other local schools which required improvement.

Government funding changes were creating tensions within the schools community. Much work had been done locally to create a school led education partnership, which had made a difference. Different schools needed different support at different times.

LM advised that the LA had not set aside any funding in the event that Schools Forum didn't approve funding. The worst case was that no proactive school improvement work would be done. It was in everyone's interest to find a solution. She hoped that the government would at least postpone the proposed

change. The Chair noted that the Forum's view was required now in case the government position didn't change.

A member asked that DfE should be sent the clear message that their proposed change was not supported. The Chair advised that the consultation had now closed. LM advised that the LA position had been made clear, including to MPs and by the leader. Any school leader wishing to make further representations could only add weight.

LM advised that the general fund contributed to school improvement costs but could not bear the additional costs for which the levy was proposed.

Representatives of maintained schools voted 8-1 in favour of the proposed additional levy for statutory school improvement services, subject to DfE proposals being implemented (with 1 recorded abstention).

Additional school improvement services

The DfE proposals meant that decisions on deducting funding for additional school improvement services could no longer be sector specific but would apply equally to primary, secondary and special schools and PRUs. This meant that deductions could no longer be limited to primary schools, as in Surrey at present. Therefore, it was proposed that the £8.75 per pupil deduction, already agreed for primary schools as de-delegation, should be extended to maintained secondary and special schools and PRUs if the DfE proposals were implemented.

Members suggested that there was a wide difference between the needs of primary and secondary schools for additional school improvement and leadership support.

Members suggested that the LA should agree to refund any funding deducted from individual maintained secondary and special schools and PRUs, to those schools. It was noted that primary schools had already agreed to the deduction in another form. Any refund may need to be earmarked for expenditure linked to school improvement issues.

Representatives of maintained primary, secondary and special schools and PRUs agreed to the proposed additional deduction by 9 votes to 1, on the basis that funding deducted from secondary and special schools and PRUs would be refunded.

11 Approval of growing schools fund budgets and criteria for 2022/23

DG reminded the Forum that the growing schools fund provides additional support to growing schools (i.e. planned increase in capacity, whether permanent or temporary). This is because mainstream funding must usually be based on previous October census data and growing schools fund helps schools which are adding classes in year who would otherwise have to wait a year for funding for those extra pupils. It can apply only to planned growth, not to filling existing vacancies. The budget and criteria require annual approval by Schools Forum.

The proposed criteria were set out in the paper. The only proposed change was to extend the use of average pupil numbers to any secondary school losing a bulge class. This did not affect any secondary school in 2022/23 but was proposed in order to give due warning to any school affected in future years. The proposed budget would be updated when October 2021 census data had been fully analysed.

The Forum agreed the proposed growing schools fund criteria without a vote.

12 Falling rolls fund

DG explained that the LA is allowed to have a fund to assist good or outstanding schools with temporary falls in roll (not just falls in roll). The item was intended to give the Forum an opportunity to discuss the issue and to show that the LA had considered the issue. Primary school pupil numbers are falling in all areas and are mostly likely to continue falling, therefore criteria for such a fund were not met.

The Forum had no comments to make.

13 Arrangements for school related government grants for 2022/23

The Forum is expected to discuss the arrangements for the administration of government grants to schools annually. The item was really for information only as most school related grants are passed on to individual schools and the amounts to be passed on are specified by DfE.

The Forum had no comments to make.

14 Schools Forum business

Items for next meeting-to include a discussion of special schools' inflation funding for 2022/23.

15 Any other business

None

Meeting ended 4.00pm

Date of next meeting **Friday 14 January 2022** 1pm, virtual meeting