



## Surrey Schools Forum Draft Minutes of Meeting

**Friday 10 January 2025 1pm on Teams**

Approved by Chair. Subject to approval by members at meeting on 13 May 2025

### **Present**

#### **Chair**

Jack Mayhew	Learning Partners MAT	Academy member
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#### **Joint Vice-Chairs**

Justin Price	Freemantles School	Special school head
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#### **Other school and academy members:**

Donna Harwood-Duffy	Dorking Nursery school	Maintained nursery sch rep
Zoe Johnson-Walker	The Winston Churchill School	Maintained secondary head
Nick Elliott	NE Secondary short stay sch	PRU representative
Liam McKeevor	Oatlands School	Maintained primary governor
Chris Hamilton	Portesbery School	Maintained special sch governor
Ben Bartlett	Hinchley Wood Learning Partnership	Academy member
Sir Andrew Carter	South Farnham Educ Trust	Academy member
Jeanette Cochrane	The Howard Partnership Trust	Academy member
Karyn Hing	Westfield School	Academy member
Sarah Kober	Lumen Learning Trust	Academy member
Gareth Lewis	Elmwey Learning Trust	Academy member
Amanda Merritt	Maybury Primary School	Academy member
Kerry Oakley	Carrington School	Academy member(part)

#### **Non-school members**

Tamsin Honeybourne	Unions: Education Joint Committee
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#### **Local Authority Officers**

Julia Katherine (JK)	Director–Education and Lifelong Learning
Eamonn Gilbert (EG)	Assistant Director -Commissioning (item 9)
Carol Savedra (CS)	Assistant Director-Commissioning
Kay Goodacre (KG)	Strategic Finance Business Partner (CFLL)
Nikki Parsons (NP)	Deputy Strategic Finance Business Partner (ELLC)
David Green (DG)	Senior Finance Business Partner (Schools Funding)

Paul Smith of HR attended to present item 10,  
Anwen Foy, Surrey Virtual School Headteacher, attended to present item 12.

Maria Dawes, SAFE, attended as an observer.

## **1 Welcome, Introductions and Apologies for Absence**

The Chair welcomed members.

Apologies for absence had been received from:

Clare McConnell	Bisley Primary School	Maintained primary Head
Jo Vigar	Charlwood Primary	Maintained primary governor
Elaine Cooper	SWAN trust	Academy member
Jo Hastings	Ottershaw Infant and Junior	Academy member
Matthew Alexander	Greensand MAT	Academy member
John Winter	Weydon MAT	Academy member
Neil Miller	Bramley Oak Academy	Special academy member
David Euridge	Inclusive Education Trust	AP academy member
Folasadi Afolabi	Unions: Education Joint Committee	

## **2 Declarations of interest for this meeting and register**

There were no declarations of interest over and above those in the register.

## **3 Minutes of previous meeting (8 October 2024)**

### **Accuracy**

The minutes of the previous meeting were agreed as accurate.

### **Matters arising (not covered elsewhere on the agenda)**

No matters arising were discussed as such, although a few issues from the previous meeting were covered under specific items.

## **4 Final Dedicated Schools Grant settlement 2025/26**

DG noted that the provisional DSG settlement had been late because of the impact of the change of government. The final settlement had been announced on 18 December 2024.

### **Schools block**

£60m of assimilated grants had been added to the baseline, including the full year impact of core schools budget grant, which had been paid for only seven months in 2024/25 (estimated at £11m for the remaining five months, or 1.3% of schools' budgets). This meant that the National funding formula (NFF) increases did not need to cover the remaining part year impact of that part of the teacher pay award which had been funded from grant in 2024/25.

Most NFF formula factor values had increased nationally by 0.5% above grant assimilation. Minimum funding guarantee had increased by 0% plus impact of grant assimilation. The overall value of Surrey's schools block had fallen by £0.9m, compared to 2024/25 plus grants, due to a fall in pupil numbers in both primary and secondary sectors (average 0.8%) and a reduction in growth funding due to reduced pupil growth.

### **Central schools services block**

After allowing for assimilation of grants, the total value in 2025/26 is close to that in 2024/25, inflation being offset by reduced historic commitment funding and by reduced pupil numbers.

### **High needs block**

The increase of £15.5m was made up of £13.6m increase in formula funding allocation, at 7% per head of 2-18 population (the minimum increase, as Surrey is a floor authority), plus an increase in basic entitlement of £1.9m for increased pupil numbers in state maintained and independent special schools. Estimated 2-18 population has fallen by 0.38%. The special schools minimum funding guarantee (the minimum increase in place and top up funding per pupil) has been set at 0%. Core budget school grant for special schools and PRUs had not been assimilated into DSG but would still be paid separately.

### **Early years block**

Once again there is a large increase in the early years block, due largely to the full year impact of the funded entitlement for children aged 9 months to two years of working parents, introduced from September 2024, and to the extension of the working parent entitlement for children aged 9 months-3 years to 30hrs/week from September 2025. The level of permissible central spend has been reduced from 5% of total funding to 4% from 2025/26. Early years pupil premium had been increased from 68p/hr to £1/hr, but this only affected a small number of children.

The Forum noted the paper and had no questions on it.

## **5 Growing schools fund 2025/26 and update on 2024/25**

DG reminded the Forum that it had the right of approval of the growing school budget and criteria. The growing schools budget funded additional classes required from September 2025 due to increases in Published Admission Number (PAN) and necessary bulge classes, plus related costs. The Forum was asked to note revised projections for 2024/25 and to approve proposed criteria and budget for 2025/26. Criteria were set out in full in the paper and in annex A, but were little changed from the current year. There was a specific (but not ringfenced) allocation for growing schools within the DSG, of £2.372m compared to £4.018m in 2024/25, reflecting reduced historic pupil growth

Officers proposed to transfer £250,000 from combined growth and falling rolls allocations and to add it to the sum distributed to all schools through the mainstream funding formula in 2025/26. This was less than the amount transferred in 2024/25 (£800,000) because growth funding allocations had fallen faster than growth costs.

In 2024/25 the LA had set aside a contingency for four additional secondary school bulge classes, over and above those needed for pre-agreed PAN increases. Although there was a risk that one or two such classes may be needed in September 2025, the LA had not set aside such a contingency in 2025/26 but had opted to bear the risk. Should the classes be required, they would still be funded based on the agreed criteria and the budget would be overspent. Officers were also aware that extra classes might be needed in the secondary sector due to fewer pupils attending independent schools now that VAT was applied to their fees, but as the impact was unknown they had opted not to provide a contingency for it. Any overspend would form part of the DSG carry forward to 2026/27 and would be considered in the context of 2026/27 budget decisions. The growth fund was still likely to be underspent taking one year with another, given the large forecast underspend in 2024/25.

Where a school is extending its age range (eg infant school converting to primary) the additional pupils must be funded by using estimated pupil numbers in the main funding formula, but the funding for the additional pupils comes from the growth fund allocation. The proposed basis of funding for the additional classes was unchanged from previous years, and the schools concerned were listed in Annex B.

The proposed basis of pre-opening funding for new free schools was set out in the paper, for completeness and continuity, but was not expected to be needed in 2025/26.

Funding rates per additional pupil, and the proposed funding rates per eligible funded vacancy, would be calculated from 2025/26 funding formula rates on the same basis as the previous year.

One member asked whether the growth fund could be used to assist schools with the cost of the increase in EHCPs. Regulations limited use of the growth fund to funding additional mainstream places. The cost of additional provision for EHCP growth was a cost to the high needs block. However, it was noted that the proposed transfer of schools block funds to high needs block in part supported funding for EHCP growth.

The Chair noted that the LA had taken a slightly different approach to risk than in previous years.

#### The Forum

- \* noted current estimates for growing schools funding for 2024/25;
- \* agreed the proposed criteria for growing schools funding for 2025/26 (summarised above and described in Annex A, (there are no significant changes))
- \* agreed the provisional growing schools' budget for 2025/26
- \* supported the proposed methods for the use of average pupil numbers for schools changing age range

- \* agreed the proposals for advance funding of pre-opening costs of wholly new primary schools, should it be required
- \* agreed that all expenditure meeting the above criteria can be incurred during the year for any school meeting those criteria.

## **6 Falling rolls fund 2025/26**

### **General proposal**

DG reminded the Forum that there was now a DSG allocation for assistance to schools with falling rolls. The LA was allowed to allocate additional funding to schools where pupil numbers had fallen (other than by reduction in PAN/removal of bulge classes) and where the vacant places thus created would be required by September 2027 (inclusive) as a result of pupil growth in the area. In the September 2024 funding consultation, the LA had proposed, and a majority of schools had supported, proposals to provide additional funding in 2025/26 for primary schools where pupil numbers had fallen by more than 5% since October 2022 or October 2023 (whichever was higher), and which were in planning areas where sufficient overall growth was expected before September 2027 for the places to be required.

The modelling had been based on 2024 School capacity return data, from summer 2024. Actual October 2024 pupil numbers had been appreciably below forecast in several areas, suggesting that pupil growth in or by September 2027 may have been overestimated. This increased the cost of the proposed falling rolls funding if the same September 2027 estimates were used. Thus the LA now proposed:

- \* to maintain the 5% eligibility threshold, i.e. eligible schools would be funded for falls in rolls in excess of 5%, to the extent that the places were needed in or before September 2027
- \* to contain the total cost within £500,000, which was likely to mean funding for vacancies would be below the 90% of basic entitlement previously proposed (NB all eligible vacancies would still be funded at the same rate per place)

Setting the budget at £500,000, taken alongside the growth funding decisions above, releases £250,000 to support the main formula (as above)

One member asked whether setting funding at a lower level would make recipient schools unviable and suggested that it was important that that didn't occur. DG commented that circumstances of each school would differ, e.g. a school funded for a 15% loss of pupils might previously have been full, whereas a school might be half empty already and see only a small further reduction in pupils and thus not receive additional funding. Recipient schools would still be better off than if no falling rolls funding was provided. He thought it quite likely that the method would require revision in future years following experience (and updating of forecasts). KG noted that the method, and its impact on schools, would be reviewed annually by Schools Forum, and that over time the impact would become clearer. The LA was not required to provide falling rolls funding. Capping the total amount allocated reflected a tight overall settlement and reservations about data quality. A review would be built into the workplan.

One member asked why falling rolls funding had not been offered to secondary schools. DG commented that, in general, rolls in the secondary sector were still

rising. While there were a few exceptions, it was unclear whether their vacancies would be needed within the required timescale. But similar funding for secondary schools could be reconsidered in future years if circumstances changed.

In principle the LA could spend more on falling rolls than the DfE allocation, but that would mean reducing main formula allocations.

The Chair noted the serious impact of falling rolls on primary schools and the need to do what could be done to assist them.

### **Special case: Lakeside Primary School**

DG reminded Forum members that a year ago they had agreed as a special case to provide additional funding to Lakeside Primary School, which had lost pupils to other local schools with vacancies, when the school moved to a site on a new housing estate 2.8 miles away. The proposed additional funding was intended to compensate for the loss of pupils attributable to the move, and was provisionally agreed for three years.

The Forum was asked to agree funding for 2025/26, on the same principles as 2024/25, at an estimated cost of £231,000.

The Forum agreed:

- the proposed criteria for falling rolls funding for 2025/26, including the special case, and the proposed falling rolls budgets
- to defer determination of the funding rate per eligible vacancy, until the number of September 2025 applications for primary places is known (probably in April 2025)
- that funding may be allocated to schools meeting the above criteria without further approval.

## **7 Final proposals for schools funding formula 2025/26, including update on disapplication requests for 2024/25 and 2025/26, de-delegation for 2025/26, notional SEN and additional SEND funding and post 16 mainstream SEN place funding**

### **Mainstream funding formula**

Nationally most schools NFF formula factors have increased by 0.5% per pupil from 2024/25 to 2025/26, plus the impact of assimilation of grants and of extending core school budget grant to full year value (estimated by DfE at a 1.3% increase, but needed to meet the full year impact of 2024/25 cost increases). Surrey's usual approach has been to scale all formula factors equally for affordability, except that lump sums have been slightly higher and basic entitlements slightly lower than that, in order to support small schools. It is proposed that this general approach is retained in 2025/26. The detailed proposals assume that a transfer of 1% of schools block to support the high needs block will be approved by DfE, and include use of £250,000 from the DfE falling rolls allocation within the formula.

In the autumn consultation, the majority of schools supported setting funding rates sufficiently below DfE rates to avoid the use of a ceiling on large per pupil gainers.



Based on the latest data this means an increase of roughly 0.36% in formula factor rates, lower than the national 0.5%, reflecting data changes locally, and a minimum funding guarantee of 0%. A ceiling on gains was considered as a possible alternative, but in 2025/26 the main losers from a ceiling would be small rural schools in receipt of sparsity funding and with large falls in pupil numbers, thus conflicting with the aim of supporting small schools and thus this could not be recommended. Examples were given in the annexes.

### **Alternative formula factors if DfE rejected block transfer request**

The DfE had not (at least yet) agreed to the LA request to transfer 1% of schools funding to the high needs block. Should this not be agreed, the LA proposed to set funding rates higher than above (approx. 99.73% of NFF). The Forum was asked to support this proposal for use if required, as there would not be sufficient time to reconsult the Forum later if DfE turned down the request.

### **Exceptional premises factor request for rents of essential accommodation**

The LA had asked DfE to approve continued funding of rents of essential accommodation. The proposal was exactly the same as current arrangements, but the DfE now required annual applications. The DfE expected to know Schools Forum's view of the proposal and thus the Forum was asked to support it.  
(Update: approved by DfE 22 January)

### **De-delegation**

The LA proposed to increase all de-delegation rates by 3.6% in 2025/26. This differed from the proposal approved in October (in which some rates would increase by more than that and some by less). Representatives of maintained primary and secondary schools were asked to approve the revised proposed rates for services previously approved for de-delegation.

The Chair noted that a number of primary headteachers had expressed concern over the arrangements for de-delegation of funding for non-statutory school improvement. They sought clarification that de-delegation could be, and had been, approved on the basis that SAFE managed the funding. They had understood that to be so when deciding to agree to de-delegation.

JK confirmed that SAFE would manage this funding in 2024/25 and 2025/26 and that there were no current plans to change these arrangements, KG noted that de-delegation had to be approved annually and that the Forum had the right to approve, or not to approve. any proposals in future years for de-delegation of funds, to be spent in a different way. Schools Forum could refuse proposals to de-delegate funds to use another body to deliver the service or to change the nature of the service delivered. (Note: De-delegation is to the LA, to spend in line with the de-delegation approval. Schools Forum may choose to cease de-delegation for any reason, but there would be an expectation that schools would be consulted on any such changes and that Schools Forum would have regard to their views).

KG commented that any de-delegated service should be subject to annual reporting of spending against budget and that for governance purposes the LA was responsible for reporting on the funds de-delegated for SAFE. The Chair thought

mention of the requirement to report to Forum on the use of the funds had caused confusion.

Members asked for a simple explanation to be provided for colleagues of what was de-delegated and how the funding was used. **Action for JK/KG/DG?**

One member asked whether it was appropriate to apply the standard 3.6% increase to union facilities costs, given that the budget was typically underspent. Officers would investigate.

It was noted that there was only one maintained primary school representative present, so maintained primary reps would be contacted separately and asked to approve the 3.6% increase. **Action DG** (Update 24 Jan: those reps have now been contacted, three out of four agreed with the proposals)

### **Notional SEND budgets**

DG reminded the Forum that it had supported increasing notional SEND budgets so that the proportion of each formula factor used was in line with the 2024/25 national average. That meant an increase in notional SEND funding from £61m to £82m. This was partly because a higher proportion of additional needs factors was being included in notional SEND, and partly because the factor values had been increased through assimilation of grant.

### **Additional SEND funding**

The Forum had supported the allocation of additional funding for primary schools for which the cost of the first £6,000 per EHCP exceeded 80% of the notional SEND budget, and thus that proposal would be implemented. Funding for 2025/26 would be based on the average number of EHCPs in October 2024, January 2025 and May 2025 and thus allocations to schools, and the total funding requirement, would not be known until May. Any variation from budget would be a risk to the LA.

### **Place funding for pupils with EHCPs in mainstream sixth forms**

DG reminded the Forum that, by local arrangement, mainstream school sixth forms were funded at £6,000 per pupil with an EHCP receiving top up funding. This funding recognised that there was no notional SEN funding for sixth forms. As this was a local arrangement, the Forum was being asked to support its continuation.

The Forum agreed, without a vote, to:

- \* support the proposed basis of setting the NFF formula funding rates for 2025/26 (ie 0% minimum funding guarantee and no ceiling, with increases in lump sums following the principles in the autumn consultation)
- \* support the proposed alternative formula proposal, for use if DfE rejects the proposed transfer of funds to high needs block.
- \* support the proposed disapplication requests in respect of premises rents (see Annex C)
- \* support the continuation of local place funding arrangements for post 16 mainstream high needs SEND pupils not in SEN centre places
- \* support the proposed implementation of additional SEND funding, on the basis agreed above.



The Chair asked that maintained primary school representatives should be asked separately to approve proposed de-delegation rates, as only one had been present at the meeting. **Action DG to contact (now completed, see above)**

### **8a Central schools services block 2025/26**

DG reminded the Forum that the CSSB funded statutory LA responsibilities which applied both to maintained schools and academies and which mostly had never been delegated to maintained schools or academies. There was no expectation that this funding was delegated. The Forum has the right of approval of expenditure from the central schools services block (except payments to the DfE for licences and subscriptions). The LA has the right of appeal to the Secretary of State if the Forum refuses.

Various teacher grants had been assimilated into CSSB for 2025/26, and an in-year increase in copyright licensing funding had been given in year, but apart from that the funding level had barely changed from 2024/25 to 2025/26. Increases for inflation had been offset by reductions in historic commitment funding and in pupil numbers. Proposals for spending CSSB were very similar to the previous year. The LA would need to manage the impact of cost increases.

The Forum approved the proposed expenditure from CSSB.

### **8b Central services levy deductions 2025/26**

These are deductions from maintained schools' budgets (including special schools and pupil referral units) to cover LA expenditure on statutory duties for maintained schools only (where academies/MATs are responsible for the corresponding duties). The proposed services were similar to 2024/25. The LA proposed an increase of 3.6% in the per pupil deduction rate to cover inflation. The LA would still need to make reductions in services as the available budget was reduced due to increased academy conversions. The estimated deductions reflected 2024/25 academy conversions, which had been higher than in recent years, and also an estimate of 2025/26 conversions. It was noted that sometimes these might be necessary LA duties which schools might not see as beneficial, e.g audit and monitoring.

The proposed deductions were shown separately for statutory school improvement and other services. The proposed total of £44.00 per pupil represented an average of 0.82% of maintained primary school budgets and 0.62% for secondary, (NB we are required to use a standard rate for both sectors).

Some members had expressed concern at a suggested lack of clarity over the services included and over the level of service actually provided from the deducted funds, and what was traded. Governor services and monitoring of national curriculum assessment were given as specific examples. Colleagues asked how much of these budgets was transferred to SAFE and how much was retained by the LA. **Action:CS to prepare paper on governor services for May meeting.**

One member asked why SAFE subscriptions for traded school improvement work were the same for maintained schools and academies if the LA retained funding from the proposed deductions from maintained schools. The SLA with both sectors covered the same traded services, The retained duties funded by the deduction were separate and set out in the contract with the LA.

CS advised that SAFE now provided governor support and that what was provided under the SLA exceeded basic statutory responsibilities e.g. it included a training offer.

The Chair suggested a briefing to Primary Council on statutory services provided from the levy deduction, for all services included. This could also clarify what is provided by SAFE and what is provided directly by the council. **Action for JK/KG?**

One member asked for clarification as to whether any of the teacher pension costs was for charges by Capita, expressing concern over the standard of service they provided. **Action; DG to check with Corporate**

Maintained school reps present approved the proposals, The Chair asked for more transparency in future over the details of the statutory duties.

## **9 Special Schools and Pupil Referral Unit inflation funding process for 2025/26**

Eamonn Gilbert reminded the Forum that, unlike mainstream funding, there was no national funding formula for special schools and PRUs. Inflation allowances were negotiated by individual local authorities from the high needs block. In 2025/26 there had been a near-7% increase in Surrey's high needs block but this needed to cover significant current and new year EHCP growth not just inflation. In Surrey, as in previous years, we held discussions with special school and PRU headteacher working groups on cost pressures and expectations, which might include modelling of individual school data, to better understand any pressure the schools were facing. High percentage increases in pay for the PS3 grade had been a particular cause for concern in recent years, as special schools had many staff on that grade. The intention is to arrive at an agreed increase and basis of distribution to be recommended to phase council for agreement. For 2025/26 the target was agreement at phase council on 31 January, but in practice it might have to be February, to be agreed with the working groups. For 2024/25 the percentage increase for PRUs had been the same as for special schools and that is our expectation for this year too.. For illustration the estimated cost of a 1% increase was £0.9m.

One member noted that in previous years DFE had stated a minimum increase for schools, following concerns that in one year some LAs (unlike Surrey) had not passed on any increase). The member accepted that there were discussions but questioned how much negotiation there could actually be. EG agreed that there was more limited flexibility over the amount available, as opposed to its distribution

Members noted the impact of higher than expected Surrey pay settlements, particularly for low paid staff.

EG would provide an update to Schools Forum on the agreement reached. **Action for EG**

The government had promised additional funding towards the increases in employer NI but the amount and basis of distribution were not yet known. Such funding would be in addition to any inflation uplift amount agreed for 2025/26.

## **10 Support staff pay update**

Paul Smith reminded the Forum that Surrey had used local pay since 1997, initially to allow Surrey to pay above national rates. However, now local pay rates had fallen below National Joint Council rates, partly due to financial pressures. Local negotiations had been complex. The forthcoming Employment Rights Bill aimed to introduce new pay arrangements for school based staff, outside LA control, although that was unlikely before April 2026. The LA was consulting unions on a two step process, increases in pay in 2025/26 at the same percentage as NJC (not yet known) and movement onto appropriate NJC grades in 2026/27, Unions were balloting members recommending acceptance. The proposal to move to NJC grades was unlikely to affect schools if the proposed national arrangements for school support staff were implemented.

An additional day's leave was proposed for staff with five years' service or more, this had initially been proposed for 2024/25 but withdrawn due to failure to reach a collective agreement on the whole package. It was noted that this created a cost pressure for school staff on term time only contracts. PS noted that the NJC sick pay arrangements were less favourable than Surrey's for new starters but more favourable for longer serving staff. The national scheme offered six months' full pay and six months' half pay, whereas Surrey offered three months full pay and three months half pay.

NJC pay settlements were usually agreed quite late in the year, which prolonged uncertainty in budgeting. Member authorities had been advised to budget for a 3% increase. As an interim measure Surrey would increase hourly rates for PS1/2 to match the new national living wage from 1 April 2025.

The Chair noted that the new school support staff review body would have considerable influence.

## **11 Early years DSG and Early years budget grant update**

CS noted that the Early Years block funding for 2025/26 would be £202m, compared to £80m in 2023/24. The budget would depend on actual takeup and she forecast it would actually be £220m. Locally, there had been sufficient places so far to accommodate the growth in takeup, although there had been an increased need to support new providers, who might be admitting age ranges with which they lacked experience. Providing support had been challenging because of recruitment controls.

The allowable limit on centrally retained funds had been reduced from 5% (as per Surrey's October consultation) to 4% for 2025/26 (albeit that was still a higher cash figure than that retained in 2024/25). CS expected a reduction to 3% in 2026/27.

Early years budget grant has been allocated by DfE in 2024/25, mainly to assist the sector with the cost of the September 2024 teacher pay increase. The LA proposed to distribute this to maintained schools (who must employ a qualified teacher in the nursery), and to academies and independent schools which actually did employ a qualified teacher in the nursery. The funding would be distributed before the end of the financial year. Initially a 15% contingency deduction would be held for data changes, but that would be distributed before the end of March.

CS confirmed that a qualified early years teacher on teacher pay and conditions and in the teacher pension scheme would be eligible for the grant.

Early Intervention fund for 3-4 year olds looked likely to be overspent in 2024/25 but taken across all age ranges EIF should not be overspent. CS proposed not to change the percentage of funding for each age range allocated to EIF in 2025/26 but to review it for future years.

The Forum noted the issues.

The Forum approved the revised proposed 4% central retention.

## **12 Surrey Virtual school pupil premium plus for looked after children update**

Anwen Foy explained that there were around 1000 looked after children of which around 650 were statutory school age and therefore were eligible for pupil premium plus and 50% of these children are in local authorities other than Surrey, so the system needed to be easy to administer and for schools to access. The pupil premium plus policy is reviewed annually. Surrey's policy requires a good quality personal education plan before releasing pupil premium, in common with many LAs. Effective use of pupil premium plus is integrated into the PEP template. There were still some schools which chose not to request release of pupil premium and these were followed up with designated teachers. Around 2/3 of pupils benefitted through schools requesting PP+ directly for them. However, all Surrey looked after children benefitted from PP+ through an additional payment made by the Virtual School for each child to support them with transition. Many children also benefitted from centrally delivered intervention, as described in the report. An annual survey of designated teachers was undertaken which collected information on how pupil premium was used. This had identified a number of creative approaches to its use, both for academic and social/emotional development. Some pupil premium plus was spent centrally, e.g. on an SLA with the Race Equality Minority Achievement service, education psychology support for looked after children and a range of training courses.

The Forum noted the report.

### **13 Arrangements for distribution of government grants**

DG explained that the LA was expected to consult Schools Forum annually on the arrangements for distribution of government grants to schools. For most such grants the DfE specified how much was to be paid to each school and all the LA could do was to pass on the allocations to maintained schools as soon as possible via the funding tabs. The LA had had some discretion over the distribution of some grants to special schools and PRUs, and consulted the headteacher working groups for each sector on the basis of distribution.

The Forum was invited to discuss the issue and any concerns.

Members had some concerns regarding distribution of SEN funding (non grant), which have been noted under AOB below.

### **14 Proposed changes to the Surrey Scheme for Financing Schools**

DG proposed a range of minor adjustments to the Scheme for Financing Schools, which had been subject to consultation with all maintained schools via the Bulletin in December. No responses had been received to that consultation. The changes largely more accurately reflected current practice.

One member asked why the LA proposed to change the criteria for seeking further information on surplus balances from 5%/8% of budget to “where the level of balances was a cause for concern”. DG advised that, some years ago, the DfE had set concern thresholds of 5% for secondary schools and 8% for others. The DfE no longer used those thresholds and in practice Surrey was unlikely to look at balances unless their level was somewhat higher than that.

The Forum approved the proposed Scheme changes.

### **15 Schools Forum issues**

Dates of next meeting: 13 May (virtual), 1 July (Woodhatch)

Note workplan (accompanying papers)

Add discussion of SEND, de-delegation and statutory duties to workplan.

### **16 AOB**

#### **Delays in distribution of SEND funding**

Members expressed concern over delays in distribution of SEND top up funding. KG advised that it was not a Schools Forum issue but that officers were looking at changes to the payment process and at how to provide clearer information to schools on what payments were for and whom to contact. This was one of the issues which the new school business manager reference group would be asked to look at.

One member noted that the Leader’s EHCP timeliness group had been disbanded. JK advised that the Leader’s meeting was not the EHCP timeliness group. The EHCP focus groups with school representation that are part of the EHCP end to end review will continue. The Leader’s meetings had been set up as an additional stakeholder group with phase leads and the chair of

Schools Forum, however it had been decided these meetings were no longer needed as the discussions duplicate those held in other forums. A lot of work has been done with SCC and phase council leads to map out all of the partnership working groups with school representation in order to avoid duplication and make best use of school leaders' time.

### **Child Wellbeing Bill**

A member noted that the Child Wellbeing Bill appeared to place additional statutory duties on local authorities. He asked whether the LA had a view yet as to what changes in teams would be required and whether that would have an impact on schools funding. It was agreed that the issue should be added to a future agenda.

### **Action for JK/KG?**

### **Funding deductions for permanent exclusions**

Members understood the basis for these, but asked why no funding was received on a similar basis for directed admissions/fair access panel admissions. Funding for reintegrated excluded pupils is specified by regulation and works in the opposite way to exclusion deductions (if the pupil was excluded in the same financial year). There is no in-year funding for other directed or fair access admissions (except for year 11s).

Meeting ended 3.40pm