

**Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum on 6 December 2023**

## Schools Forum meeting held remotely on Wednesday 11 October 2023

To view the archived recording of this meeting, please see here:  
<https://bradford.public-i.tv/core/portal/home>

Commenced 08:00  
Concluded 10:00

### RECORD OF MEETING ATTENDEES, APOLOGIES AND ABSENCES

#### Schools & Academies Members

##### IN ATTENDANCE

<b>Member</b>	<b>Membership Group</b>
<b>Ian Morrel (Chair)</b>	<b>Maintained Secondary Schools – Headteacher</b>
Ashley Reed (Vice Chair)	Academies Member
Wahid Zaman	Academies Member
Amanda Sleney	Academies Member
Jonathan Nixon	Academies Member
Rowena Dixon	Academies Member
Matthew Hill	Academies Member
Brent Fitzpatrick OBE	Academies Member
Sarah Murray	Academies Member
Melanie Saville	Academies Member
Lyndsey Brown	Academies Member - Special School Academies
Sian Hudson	Maintained Nursery Schools - Headteacher
Graham Swinbourne	Maintained Primary Schools - Headteacher
Kathryn Swales	Maintained Primary Schools - Headteacher
Helen Willett	Maintained Special Schools

##### APOLOGIES RECEIVED

<b>Member</b>	<b>Membership Group</b>
Victoria Birch	Academies Member
Helen Williams	Academies Member
Michael Thorp	Academies Member
Isabel Peat	Academies Member
Richard Bottomley	Academies Member – Alternative Provision Academies
Bev George	Maintained Nursery Schools – Governor
Victoria Merriman	Maintained Primary Schools - Headteacher

##### NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

<b>Member</b>	<b>Membership Group</b>
Jon Skurr	Academies Member

Kirsty Ratcliffe	Pupil Referral Unit (maintained)
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### **Non-Schools Members**

#### IN ATTENDANCE

Member	Membership Group

#### APOLOGIES RECEIVED

Member	Membership Group
Tom Bright	Teaching Unions
Ruth Terry MBE	Officer Representing Vulnerable Children

#### NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Junaid Karim	Council for Mosques (Bradford)

### **Substitute Members present at the meeting as a Member (not as an Observer)**

Substitute Member	Membership Group
Adrian Coghill	Teaching Unions
Louise Sagar	Academies Member

### **Substitute Members present at the meeting as an Observer (not as a Member)**

Substitute Member	Membership Group

### **Local Authority Officers present at the meeting**

Officer	Position
Asad Shah	Committee Secretariat
Niall Devlin	Assistant Director, SEND and Inclusion
Marium Haque	Strategic Director
Dawn Haigh	Principal Finance Officer (Schools)
Andrew Redding	Business Advisor (Schools)

**40% of the School Forum's membership (filled membership positions) must be present for a meeting to be quorate. This meeting was quorate, with 63% of members present (17 out of 27 currently filled membership positions). No allocations were presented, and no resolutions were passed on this item.**

### **IN THE CHAIR**

#### **720. DISCLOSURES OF INTEREST**

No interests were declared.

#### **721. MINUTES OF 13 SEPTEMBER 2023 AND MATTERS ARISING (minutes)**

In introducing the meeting, the Chair welcomed Victoria Merriman as a new member to the Forum. The Chair alerted members to the DfE's error and revision, published on 6 October, of the 2024/25 financial year Schools Block funding settlement and National Funding Formula and thanked the Business Advisor (Schools) and his team for responding swiftly to provide amended modelling to this meeting.

The Business Advisor (Schools) reported on progress made on "Action" items from the 13 September meeting. He reported that:

- **Item 707 (Early Years Supplementary Grant):** A document is included in the meeting reports pack under matters arising, providing an initial response to the question that was asked at the last meeting about why Bradford's EYSG allocation is below national medians. This is a holding response pending further information to be presented to a future meeting.
- **Item 708 (Early Years Block funding):** an update will be provided verbally to this meeting.
- **Item 709 (DSG and Formula Funding Announcements):** The briefing note that was tabled to the September meeting (Document OG) is included again in the reports pack for this meeting as a useful point of reference for members. However, due to the DfE's error and amendment of the 2024/25 Schools Block funding settlement and National Funding Formula, elements of this note are now inaccurate and are replaced by the additional briefing note, which is presented to this meeting.
- **Item 710 (Formula Funding Arrangements & Consultations):** The Schools Block and High Needs Block consultations are presented to this meeting. We ran 3 FFWG sessions, which were attended by 10 members and substitute members.
- **Item 711 (High Needs Block Forecast and Mitigation Plan Development):** A small number of members have contacted me to sit on the working group. This group will be convened shortly.

**Resolved –**

- (1) **That progress made on "Action" items and Matters Arising be noted.**
- (2) **That the minutes of the meeting held on 13 September 2023 be signed as a correct record.**

## **722. MATTERS RAISED BY SCHOOLS**

**No resolutions were passed on this item**

**723. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS (A)**

**No resolutions were passed on this item**

**724. CONSULTATION - PRIMARY AND SECONDARY MAINSTREAM FORMULAE & SCHOOLS BLOCK MATTERS 2024/25 (A)**

The Business Advisor (Schools) presented a report, Document QJ, which asked the Schools Forum to consider the consultation document, which outlines the proposals for the Schools Block, the funding formula to be used to calculate allocations for mainstream Primary and Secondary schools and academies for the 2024/25 financial year, and the criteria that will form the basis of the allocation of additional funding to maintained schools (and academies where appropriate) from Schools Block centrally managed funds. The Business Advisor explained that the Authority would like now to consult on these proposals. The feedback from this consultation will be presented to the Schools Forum on 6 December. The Forum will then be asked to give its final views (its recommendations) on 10 January 2024.

However, the Business Advisor also explained that the figures contained within the consultation document included in the agenda pack, and the modelling, is revised as a result of the DfE's publication on 6 October, where the DfE has explained that an error has been made by DfE officials in the calculation of the 2024/25 Schools Block settlement and National Funding Formula, to the extent that the allocations per pupil that will be received by all local authorities and all schools and academies through the National Funding Formula in 2024/25 are now lower than the allocations that were announced on 19 July. For Bradford, the difference is 0.9% / £4.5m in cash terms. The Business Advisor referred to the additional briefing note, which has been sent to members, which explains the differences in the settlement and provides further updated modelling. He clarified that the regulations, framework and technical construct of the Schools Block and National Funding Formula in 2024/25 are still as published on 19 July. What has changed is the value of funding that is allocated. This makes the 2024/25 settlement a much leaner settlement for mainstream primary and secondary schools and academies.

In responding to the Business Advisor's presentation, members asked the following questions and made the following comments:

- A number of members expressed their disappointment, dissatisfaction and concern regarding this position. Firstly, the additional work that this error has caused / will cause, both for the Local Authority as well as for schools and academies, where budget planning and decision making for 2024/25 will now need to be substantially revised. This is at a time when the DfE is pushing for reducing workload on schools. Secondly, that this is now a lower settlement in per pupil terms than was previously announced, meaning that school and academy budgets will be directly negatively affected.
- The Strategic Director asked members to consider how the Forum should communicate this situation to schools, but also how to communicate to the DfE the Forum's concern and dissatisfaction. Following discussion on this,

members resolved that the Chair further discusses with the Business Advisor how to express the Forum's concerns (such as in a letter to the Secretary of State copying in our local MPs). The Business Advisor also informed the Forum that a note on this issue has already been published on Bradford Schools Online. He offered the view that the best way of communicating the revision of the settlement is through the detailed consultation document, which is planned to be published (subject to the Forum's approval) immediately after this meeting.

- An academies member asked for clarification on whether the transfer in of the Mainstream Schools Additional Grant (MSAG) inaccurately enhances the value of the per pupil funding increase this is actually being received by schools and academies next year. The Business Advisor clarified that this isn't the case as, within the year-on-year funding comparisons, MSAG is included in both 2023/24 and 2024/25 figures.

#### **Resolved –**

- (1) That the Consultation - Primary and Secondary Mainstream Formulae & Schools Block Matters 2024/25 be published.**
- (2) That the Chair and the Business Advisor (Schools) communicate (including to the DfE and to local MPs) the Forum's disappointment and concern regarding the DfE's revision of the 2024/25 Schools Block National Funding Formula settlement.**

#### **725. CONSULTATION - HIGH NEEDS BLOCK FORMULAE FUNDING 2024/25 (A)**

The Principal Finance Officer (Schools) presented a report, Document QK, which asked the Schools Forum to consider the consultation document, which outlines the formula approach that the Authority proposes to use to delegate High Needs Block funding to high needs providers, mainstream schools and academies and other settings in the 2024/25 financial year April 2024 to March 2025. The Authority would like now to consult on these proposals. The feedback from this consultation will be presented to the Schools Forum on 6 December. The Forum will then be asked to give it final views (its recommendations) on 10 January 2024.

The Principal Officer took members through the main points of the consultation document, especially focusing on the uplift of the Banded Model and the methodology for this. In response to this presentation, members asked questions and made comments, which were generally focused on the overall position of Bradford's High Needs Block and the level of uplift that is proposed in 2024/25 in the context of the challenges that are faced by schools:

- A member representing maintained primary school headteachers asked why EHCP top-up funding amounts, as proposed, are not increasing at the same rate as inflation, and why element 2 remains at £6,000, especially when the High Needs Block currently holds a significant surplus balance. An academies member added to this question, to stress that schools as well as the Local Authority are under financial pressure and a consequence of the Authority's

proposals is that schools will apply back to the SEND panel for more funding. The view put forward is that the High Needs Block surplus should be released now to support the financial pressure that schools face. The Business Advisor and the Chair of the Forum responded to these questions and comments with reference to the strategic discussions / agreements that have been had / made in the Forum over the last 2 years regarding the current High Needs Block surplus - the use of small proportion of this surplus (£0.920m) in support of inclusion but then the holding of this as part of the mitigation and management of the future forecasted deficit. The Business Advisor highlighted again for members that the High Needs Block is forecasted to overspend by £14m in 2024/25 and by £22m in 2025/26, and on this basis, the High Needs Block would be cumulatively in deficit at the end of 2025/26. Members were reminded that a working sub-group of the Forum is about to be convened to continue discussions on these matters and on mitigation. One of the elements of mitigation is exercising restraint in the way our Banded Model incrementally annually increases in the lead to the expected introduction of a national Banded Model following the national SEND review. The Business Advisor clarified that the element 2 £6,000 is a fixed national figure, which the Authority cannot adjust from. In response to these explanations, the member representing maintained primary schools added that the Authority has recently lost out on a free school bid because of our High Needs Block surplus position and reiterated their view that the surplus should be spent now. The Business Advisor responded to explain that this comment is made with reference to the DfE setting a key criteria for a successful free school bid being that an authority's High Needs Block must be in deficit. There are a mixture of ways to respond to this. The member clarified that they do not advocate going into deficit but that the surplus should be spent.

- The Strategic Director commented that the Forum has been very successful in taking decisions from a medium to longer term point of view. She added that high needs funding is under a national spotlight at the moment and is coming under increasing scrutiny because of the problems that parents, schools and local authorities face. It is understood by the Authority that all parts of the system, including schools, are under pressure.
- The member representing academy special schools explained that the District Achievement Partnership (DAP) is very aware of the District wide complexities and significant challenges. The current situation, whilst very challenging, may provide opportunities for positive change and greater collaboration between sectors, and between the DAP and mainstream schools, which would be a very positive step.

**Resolved –**

**That the Consultation - High Needs Block Formulae Funding 2024/25 be published.**

## **726. EARLY YEARS BLOCK FUNDING MATTERS 2024/25 (I)**

The Business Advisor (Schools) provided a quick update verbally on Early Years Block funding matters. He explained that no further announcements, since the 13

September Forum meeting, have been made by the DfE regarding the 2024/25 Early Years Block settlement or Early Years Single Funding Formula (EYSFF) arrangements. The Authority has been modelling behind the scenes and the Early Years Working Group (EYWG) is convened for 19 October. Members that are interested in attending the EYWG are welcome and should email the Business Advisor.

**Resolved –**

**That the information presented be noted.**

## **727. DSG CENTRAL ITEMS AND DE-DELEGATED FUNDS 2024/25 (A)**

The Business Advisor (Schools) presented a report, Document QL, which asked the Schools Forum to review the position of Central Schools Services Block, Schools Block and Early Years Block central funds and de-delegated items for the 2024/25 financial year. In his presentation, the Business Advisor highlighted that:

- The Central Schools Services Block faces increased pressure, which must be considered as part of the 2024/25 decision making round.
- A report will be presented to the next meeting in December, which will ask the Forum to consider a request from the Local Authority to increase the funding of centrally managed support services within the Early Years Block in response to the extension of the early years entitlements.
- Further information will be presented to the next meeting in December on the use and impact of the de-delegated school improvement monies that have been held for the 2022/23 academic year.
- Subject to confirmation on levels of buy in for 2023/24, because buy in to the Authority's collective Trade Union Facilities Time arrangements remains very strong, it is anticipated that the cost per pupil contribution for schools can be reduced in 2024/25 (by an estimated 5%). This will be confirmed at the next meeting in December.
- The Authority has concluded that, due to the continued conversion of maintained primary schools to academy status, there will not be sufficient 'critical mass' to continue to deliver an effective and efficient maternity / paternity insurance scheme. As such, to give primary schools time to plan, the Authority signals now that this scheme is expected to cease at the end of the 2024/25 academic year.
- Members representing maintained primary schools are asked to take a decision on whether de-delegation for the purposes of subscribing to Fischer Family Trust software continues in the 2024/25 financial year. The Authority's recommendation is that de-delegation now ceases. The 2 voting members that were present at the meeting both agreed this recommendation.

Members did not have any questions and did not make any comments on the report.

**Resolved –**

- (1) That the information presented in Document QL be noted.**
- (2) Schools Forum Members did not request at this time the further review of any of the centrally managed funds presented in Document QL.**
- (3) Members representing Maintained Primary Schools decided to cease to de-delegate in 2024/25 for the purposes of purchasing subscriptions to Fischer Family Trust.**

**728. SCHOOLS FORUM STANDING ITEMS (I)**

**No resolutions were passed on this item.**

**729. AOB / FUTURE AGENDA ITEMS**

**No resolutions were passed on this item.**

**730. DATE OF NEXT MEETING**

**Please see the published schedule of meetings – the next Forum meeting is scheduled for Wednesday 6 December 2023. The meeting will be held remotely.**

Note: These minutes are subject to approval as a correct record at the next meeting of the Forum.

THESE MINUTES HAVE BEEN PRODUCED, WHEREVER POSSIBLE, ON RECYCLED PAPER

Chair

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