

Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum on 13 October 2021

Schools Forum meeting held remotely on Wednesday 15 September 2021

To view the archived recording of this meeting, please see here:
https://bradford.public-i.tv/core/portal/webcast_interactive/599941

Commenced 0805, Adjourned 0940
Reconvened 0950, Concluded 1020

RECORD OF MEETING ATTENDEES, APOLOGIES AND ABSENCES

Schools & Academies Members

IN ATTENDANCE

Member	Membership Group
Dianne Richardson (Chair)	Maintained Primary Schools - Headteacher
Ian Morrel (Vice Chair)	Maintained Secondary Schools – Headteacher
Bev George	Maintained Nursery Schools – Governor
Brent Fitzpatrick OBE	Academies Member
Dominic Wall	Academies Member – Special School Academies
Heather Lacey	Academies Member
Helen Williams	Academies Member
Kathryn Swales	Maintained Primary Schools - Headteacher
Kirsty Ratcliffe	Pupil Referral Unit (maintained)
Lyndsey Brown	Maintained Special Schools - Headteacher
Mathew Atkinson	Academies Member
Michael Thorp	Academies Member
Nicky Kilvington	Maintained Primary Schools - Headteacher
Richard Bottomley	Academies Member – Alternative Provision Academies
Sara Rawnsley	Maintained Primary Schools - Headteacher
Sian Hudson	Maintained Nursery Schools – Headteacher
Tehmina Hashmi	Academies Member
Victoria Birch	Academies Member
Wahid Zaman	Academies Member

APOLOGIES RECEIVED

Member	Membership Group
Ashley Reed	Academies Member
Carol Dewhirst OBE	Academies Member
Emma Hamer	Maintained Primary Schools – Governor
Graham Swinbourne	Maintained Primary Schools – Headteacher
Bryan Harrison	Maintained Primary Schools - Headteacher

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Andrew Morley	Academies Member
Deborah Howarth	Academies Member
Sir Nick Weller	Academies Member

Non-Schools Members

IN ATTENDANCE

Member	Membership Group
Gillian Simpson-Morris	Representative of Early Years PVI Members
Irfan Alam	Officer Representing Vulnerable Children
Tom Bright	Teaching Unions

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Donna Willoughby	Non-Teaching Unions
Junaid Karim	Council for Mosques (Bradford)

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

Substitute Member	Membership Group
Alison Kaye	Academies Member

Local Authority Officers present at the meeting

Officer	Position
Andrew Redding	Business Advisor (Schools)
Asad Shah	Committee Secretariat
Dawn Haigh	Principal Finance Officer (Schools)
Jonty Holden	Principal Finance Officer (Schools)
Marium Haque	Deputy Director, Education and Learning
Niall Devlin	Strategic Manager, Integrated Assessment (item 11)
Raj Singh	Business Advisor (Children's Services)

Recorded Observers

Name
Cllr M Pollard

40% of the School Forum's membership (filled membership positions) must be present for a meeting to be quorate. This meeting was quorate, with 68% of members present (22 out of 32 currently filled membership positions).

572. DISCLOSURES OF INTEREST

There were no declarations of interest.

573. MINUTES OF 7 JULY 2021 & MATTERS ARISING

The Business Advisor (Schools) reported on progress made on “Action” items from the 7 July meeting:

- **Item 561 Chair and Vice Chair Nominations / Elections:** The agreed process for the collection of nominations was completed. The only nominations put forward were for Dianne Richardson as Chair and for Ian Morrel as Vice Chair. As a result, an election was not required. Dianne and Ian continue in their positions for the 2021/22 academic year. The Business Advisor explained that the Authority will wish to talk to the Forum about appropriate Chair hand-over arrangements soon within the coming year (as Dianne has stated that she will be retiring from the Schools Forum in July 2022).
- **Item 562 Schools Forum Membership:** An update on this matter is provided under agenda item 6.
- **Item 563 DSG Outturn Balances:** The agreed Central Schools Services Block to Schools Block balances adjustment has been actioned. The Forum will receive, in December, a report on 2021/22 spending and forecasted March 2022 balances by block.
- **Item 565 SLT Review:** The Speech and Language Therapy High Needs Block budget adjustment has been actioned.
- **Item 566 Early Years Block:** The Business Advisor reported that the spring term 2021 Early Years Single Funding Formula (EYSFF) adjustments have been fully actioned. The Authority has also now confirmed summer 2021 EYSFF funding with providers. The Authority submitted the required additional return to the DfE to facilitate the adjusted Early Years Block methodology for the summer term. The Authority is now preparing for the autumn term EYSFF processes, which will be based on the October Census. An update on the forecasted position of spending and pressure within the Early Years Block in 2021/22 will be presented to the Schools Forum in December. Introductory discussion on the EYSFF for 2022/23 is presented under agenda item 9.
- **Item 568 Formula Funding Development 2022/23:** An update on this is presented under agenda items 8 and 9.

The Business Advisor (Schools) reported on a number of additional matters arising:

- Following the discussion and feedback provided in the July Forum meeting, subject to conditions and facilities, we are looking to establish a form of ‘hybrid’ **approach to Schools Forum meetings**, where we would have a mixture of meetings held remotely and face-to-face (in attendance at City Hall). A possible approach will be for the more ‘substantial’ meetings (where decisions are needed or where more detailed DSG discussion is anticipated) to be held in attendance, and for the meetings, which are more about

information, update and awareness, to be held remotely. This may mean that, typically, we would look to hold in attendance meetings at City Hall in October, December and January, and that the other meetings in the normal calendar (September, March, May and July) would be held remotely, subject to conditions and facilities. The Schools Forum indicated its support for this approach to meetings in the 2021/22 academic year.

- As we have done in previous years, the Authority would like to warn primary-phase maintained school representatives that, because of the timescales needed to confirm subscription, Members will be asked at the next meeting on 13 October whether they wish to de-delegate for the purposes of subscribing to **Fischer Family Trust** next year. As such, it will be helpful for them to have collected feedback from colleagues in advance of this. We will send an email to relevant members following this meeting to help.
- **Scheme for Financing Schools** – As was reported in July, the DfE published at the beginning of April its annual update to the model template for Authority Schemes, in respect of maintained schools. There were no changes to the provisions in the Scheme that required our response or consultation with the Schools Forum. We still await changes and guidance in a couple of areas a) leases (IFRS 2016) and b) Related Party Transactions (RPTs) and the Schools Financial Value Standard (SFVS). We may be required to present proposals for Scheme amendments to the Forum in the autumn. Maintained schools will need to take action to respond to the new requirements in respect of RPTs during this year. The Authority has previously warned maintained schools about this.
- **Business Rates Payments Change:** The Education and Skills Funding Agency (ESFA) has now confirmed that the national changes proposed to how payments to billing authorities from mainstream primary and secondary schools and academies for business rates (NNDR) are managed will be implemented from April 2022. These are directed changes, that have implications for how rates charges are physically paid to billing authorities, how the ‘cash moves around the system’, and in Bradford most significantly for academies (that will not be physically required to pay their business rates charges). These changes however, do not alter how schools and academies materially are funded for business rates through the Dedicated Schools Grant nor do these alter the requirement for business rates to be recorded as expenditure within individual school and academy accounts. Guidance will be provided in due course on how the business rates payment changes will be managed in Bradford from April 2022 and we encourage all schools and academies now to read the ESFA’s consultation outcomes document.
- **Budget and Autumn Spending Review:** For Members’ awareness, the Budget and Spending Review are to be presented on 27 October. These are anticipated to give us more information (albeit probably only at a high level) about the direction of schools, early years and high needs funding for the next 3 years. Hopefully, these will accompany the release of more detailed information about early years funding for 2022/23 and will also provide a bit more clarity on the position of key policies that will affect school and provider budgets, most especially the direction of national teacher pay policy from September 2022.

To clarify also, the recent announcement of the 1.25% increase in National Insurance for the NHS and social care is being applied to both employees and to employers. The employer's contribution will increase at April 2022 from 13.8% to 15.05%, applied above the threshold. Salaries costs therefore, will increase additionally as a result of this change from April 2022. We will need to bring this into our thought processes for the 2022/23 DSG budget setting cycle. One of the key areas of immediate concern is how the NI increase will impact on the early years sector, where increases in funding rates for 2022/23 may not be at the level that will be seen by schools and high needs. *

** Added for clarity - the Government has stated that public sector employers will be compensated for the cost of the 1.25% NI levy. Following our enquiry, the ESFA has advised the Authority that further details on the approach to this compensation will be set out at the conclusion of the Spending Review on 27 October.*

574. MATTERS RAISED BY SCHOOLS

No matters were raised.

No resolutions were passed on this item.

575. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS

No allocations were presented.

No resolutions were passed on this item.

576. SCHOOLS FORUM MEETINGS & MEMBERSHIP - UPDATE

The Chair welcomed new members to the Schools Forum.

The Business Advisor (Schools) presented **Document NF**, which provides an update from the 7 July meeting on Schools Forum membership. Appendix 1 presents a full list of the membership that is in place at September 2021. The Business Advisor explained that, as a number of new members are attending the Forum at this meeting for the first time, in advance of an induction (which is shortly to be arranged), it is helpful in the report to set out the Forum's roles, responsibilities and powers and also to explain how the Forum makes its recommendations and takes decisions.

The Vice Chair added to the report to emphasise that a key activity of Forum members is to communicate with their respective sectors, so that important information is shared and also so that the views of their sectors can be expressed back to the Forum as well as back to the Local Authority, through the Schools Forum.

Forum members did not ask any questions and did not have any further comments on the report.

Resolved –

That the information presented in Document NF be noted.

LEAD: BUSINESS ADVISOR (SCHOOLS)

577. 'HARD' NATIONAL FUNDING FORMULA - DFE CONSULTATION

The Principal Finance Officer (Schools) presented **Document NG**, which summarises how the DfE proposes, in its most recent stage of consultation, to complete its 'hard' National Funding Formula reforms. The Principal Finance Officer highlighted for Forum members the main risks that these reforms present, from April 2023, and asked the Forum to support the Authority's drafted formal response, presented at Appendix 2.

The Forum gave its support to the Authority's proposed response. Members discussed how the matters covered by the DfE's consultation can best be drawn to the attention of colleagues in schools and academies, whilst also providing the opportunity for colleagues either to add to the Authority's response or to submit their own responses directly to the DfE. Members discussed how this could potentially be co-ordinated. It was agreed that Authority's proposed response be published on Bradford Schools Online, with the aims of encouraging awareness and to provide the opportunity for schools and academies either to comment on (or add to) the Authority's response or to submit their own responses before the 30 September deadline.

Resolved –

- 1) That the implications of the DfE's proposed movement to the 'hard' National Funding Formula, as presented in Document NG, be noted.**
- 2) That the Schools Forum supports the Authority's proposed response to the DfE's consultation, as presented in Document NG Appendix 2.**
- 3) That the Authority's proposed response is published on Bradford Schools Online, with the aims of encouraging awareness and to provide the opportunity for schools and academies either to comment on (or add to) the Authority's response or to submit their own responses before the 30 September deadline.**

ACTION: PRINCIPAL FINANCE OFFICER (SCHOOLS)

578. 2022/23 DSG & FORMULA FUNDING ANNOUNCEMENTS - BRIEFING

The Business Advisor (Schools) presented **Documents NH Appendix 1 and Appendix 2**, which summarise the announcements that have been made over the summer, on 2022/23 Dedicated Schools Grant (DSG) allocations and formula funding arrangements, and which explain the main implications for Bradford.

The Business Advisor emphasised that the 2022/23 Early Years Block settlement

and formula funding arrangements are still to be announced and that the position of the protected funding of maintained nursery schools from April 2022 is still unclear.

The Business Advisor explained that the net reduction in pupil numbers across the District, forecasted as a consequence of demographic trends in particular at this time for early years providers, primary schools and primary academies, is a strongly emerging theme for Bradford's Dedicated Schools Grant. As well as having implications for the funding levels of individual early years providers, schools and academies, the forecasted net reduction in pupil numbers will have consequences for the amount of budget 'headroom' that is available for the Authority to deploy within the DSG going forward in support of formula funding arrangements and other cost pressures.

The Business Advisor briefly explained how the Authority currently is seeking to work with schools, individual academies and Multi Academy Trusts, within planning areas across the District, to manage adjustments to PANs (Published Admission Numbers) in response to reducing primary-phase pupil numbers. The Authority is seeking to manage these adjustments in a collaborative way, to support the financial security of all schools and academies in the relevant planning area. The Business Advisor explained that it will be helpful to the Authority for the Schools Forum to give its support to the collaborative approach that the Authority is trying to achieve. The Business Advisor asked whether the Forum could formally resolve to give this support at this meeting.

The Forum's discussion on this agenda item concentrated on this request. Forum members asked the following main questions and made the following main comments:

- Whether all admissions applications still to be admitted will be placed in time for the October 2021 Census? The Deputy Director, Education and Learning responded that the Authority is working hard to place these applications and that the position is much as it has been in recent years. There has again been a large number of late applications, which are currently being processed. The Academies Member, who asked the initial question, asked whether more specific information on outstanding applications could be provided so that schools can help maximise the number of placements that are secured before the October Census is taken. The Deputy Director responded that she will discuss this request with the Strategic Manager, Pupil Admissions.
- The Vice Chair asked that the Authority provides the Forum with a strategic level overview of PAN management. He explained that this would help the Forum engage with this matter. Some modelling (at a strategic level) of the 'double' impact that the reduction in pupil numbers may have going forward, alongside the continued growth in the levels of need of pupils, will also be helpful. This strategic information may help us to identify issues or emerging themes that we have not yet considered. The Vice Chair added his support, that it makes sense to seek to manage pupil numbers and PAN adjustments in a collaborative way. This will be balanced with parental choice. The Deputy Director respond to agree that it is important that the Schools Forum is sighted on these matters going forward, in particular because the Authority is seeking to take action, which will help provide financial security for schools and academies. The Authority is concerned that the disengagement of an individual maintained school, or an individual academy or MAT, from a

collaborative approach, will have wider implications for the financial security of other schools and academies in the affected planning areas. Discussions are already taking place within planning areas, which are aimed at achieving the collective management of these issues. The Deputy Director added that a strategic school places plan is published by the Authority annually and that an SEND places sufficiency report is also published (and will be presented to the Schools Forum in December).

- An Academies Member stated asked how the Authority constructs its pupil number forecasts and to confirm the accuracy of these forecasts i.e. are we at risk of substantially reducing places capacity now only for this to be needed in the near future? The Deputy Director respond to explain that, shortly after taking post, the methodology the Authority uses to construct pupil numbers forecasts was adjusted, to use a more common approach, which is more accurate. We are confident that the PAN management actions that we are looking to take now are based on more accurate modelling.
- An Academies Member stated that parental choice is an important factor. Because of dropping birth rate, and reducing pupil numbers, schools and academies that are undersubscribed tend to admit a proportionately larger number of pupils that have additional educational needs, SEND and EHCPs. Is there any way the distribution of these higher needs pupils can be managed better within the admissions process? The Deputy Director responded to recognise the picture the member presents and to offer the view that is not possible to start to try to manage these issues through the admissions processes unless we work collaboratively across maintained schools and academies, in the way that the Authority is seeking now.
- A Member representing maintained primary school Headteachers stated that current parental behaviour in respect of appeals does not help ease admissions issues.
- An Academies Member stated that reducing PAN (and pupil numbers) in schools and academies has significant budget consequences, and necessitates difficult actions (staffing restructures etc.). A point to further consider here is how the process of PAN reduction could be made easier, including whether / what financial 'cushions' could be provided to support schools and academies that may be asked by the Authority to reduce their PAN in support of achieving a collective approach within a single planning area. The Deputy Director responded that the options for providing a financial cushion would be limited by the DSG / Financial Regulations. A factor that also perhaps needs to be emphasised in these situations is the financial benefit that a school or academy will achieve in the longer term, compared against the possible implications where a school or an academy, for example, seeks to retain its PAN and continues to be undersubscribed or has to try to encourage pupils that live further away in order to maintain numbers.

The Chair summarised the Forum's discussion and confirmed with members that they are happy to resolve to support the Authority.

Resolved –

- 1) That the information presented in Document NH be noted.**
- 2) That the Schools Forum supports the Local Authority in seeking to achieve a collaborative approach, between schools and academies**

within planning areas, to the adjustment of Published Admission Numbers (PANs), in response to demographic trends (reducing pupil numbers).

- 3) That places planning, places sufficiency and PAN adjustment activity continues to be discussed by the Schools Forum within the 2021/22 academic year work programme.

LEAD: *BUSINESS ADVISOR (SCHOOLS)*

579. OUTLINE - FORMULA FUNDING ARRANGEMENTS & CONSULTATIONS 2022/23

The Business Advisor (Schools) presented **Document NI**. He explained that the purpose of this report is to 'warm the Forum up' to key formula funding proposals that are likely to be put forward for 2022/23 in response to the DfE's summer announcements. The Authority currently plans to follow the timetable and approach to consultation and decision making that has worked well in previous years, but this is subject to the timing of the outstanding announcements on Early Years Block arrangements.

The Business Advisor reminded members of their opportunity to attend a Formula Funding Working Group meeting to discuss the Schools Block proposals in more detail in advance of the next Schools Forum meeting to be held on 13 October. He also asked for expressions of interest to attend the Early Years Working Group.

Forum members did not ask any questions and did not have any comments at this stage on this report.

Resolved –

- 1) That the information presented in Document NI be noted.
- 2) That Forum Members are invited to attend a 'Formula Funding Working Group' session.
- 3) That Forum Members are invited to express their interests in attending the Early Years Working Group.

ACTION: *BUSINESS ADVISOR (SCHOOLS)*

580. WORK PROGRAMME AND SCHEDULE OF MEETINGS 2021/22 ACADEMIC YEAR

The Business Advisor (Schools) presented **Document NJ**, which is the Forum's drafted schedule of meetings and planned business for the 2021/22 academic year.

Referring to the discussion earlier in the meeting, the Chair asked for clarification that the work programme includes regular consideration of matters related to the

impact of reducing pupil numbers in schools. The Business Advisor confirmed that this matter was included in the programme each term.

Forum members did not have any further comments.

Resolved –

That the programme presented in Document NJ be noted.

LEAD: BUSINESS ADVISOR (SCHOOLS)

581. SCHOOLS FORUM STANDING ITEMS

No further updates were provided.

No resolutions were passed on this item.

582. AOB / FUTURE AGENDA ITEMS

No AOB items were raised.

No resolutions were passed on this item.

583. DATE OF NEXT MEETING

The next Forum meeting is planned for Wednesday 13 October 2021.

The scheduled of meetings for the 2021/22 academic year is as follows:

- Wednesday 13 October 2021, 8am
- Wednesday 8 December 2021, 8am
- Wednesday 12 January 2022, 8am
- *Wednesday 19 January 2022, 8am PROVISIONAL MEETING*
- Wednesday 9 March 2022, 8am
- Wednesday 18 May 2022, 8am
- Wednesday 6 July 2022, 8am

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

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