

**Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum on 12 July 2023**

## Schools Forum meeting held remotely on Wednesday 17 May 2023

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

Commenced 08:00  
Concluded 10:25

### RECORD OF MEETING ATTENDEES, APOLOGIES AND ABSENCES

#### Schools & Academies Members

##### IN ATTENDANCE

Member	Membership Group
Ian Morrel (Chair)	Maintained Secondary Schools – Headteacher
Ashley Reed (Vice Chair)	Academies Member
Wahid Zaman	Academies Member
Helen Williams	Academies Member
Brent Fitzpatrick OBE	Academies Member
Victoria Birch	Academies Member
Melanie Saville	Academies Member
Sarah Murray	Academies Member
Heather Lacey	Academies Member
Richard Bottomley	Academies Member – Alternative Provision Academies
Michelle Farr	Academies Member – Special School Academies
Emma Hamer	Maintained Primary Schools – Governor
Jonathan Nixon	Maintained Primary Schools - Headteacher
Kathryn Swales	Maintained Primary Schools - Headteacher
Lyndsey Brown	Maintained Special Schools - Headteacher

##### APOLOGIES RECEIVED

Member	Membership Group
Amanda Slaney	Academies Member
Bev George	Maintained Nursery Schools – Governor
Graham Swinbourne	Maintained Primary Schools - Headteacher

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

Member	Membership Group
Andrew Morley	Academies Member
Kirsty Ratcliffe	Pupil Referral Unit (maintained)
Michael Thorp	Academies Member
Nicky Kilvington	Maintained Primary Schools - Headteacher

Mathew Atkinson	Academies Member
Sian Hudson	Maintained Nursery Schools - Headteacher

### **Non-Schools Members**

#### IN ATTENDANCE

<b>Member</b>	<b>Membership Group</b>
Tom Bright	Teaching Unions
David Johnston	Officer Representing Vulnerable Children

#### APOLOGIES RECEIVED

<b>Member</b>	<b>Membership Group</b>

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

<b>Member</b>	<b>Membership Group</b>
Junaid Karim	Council for Mosques (Bradford)

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

<b>Substitute Member</b>	<b>Membership Group</b>

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

<b>Substitute Member</b>	<b>Membership Group</b>
Alison Kay	Academies Member
Katherine Somers	Academies Member

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

<b>Officer</b>	<b>Position</b>
Sue Lowndes	Assistant Director, Education and Learning
Asad Shah	Committee Secretariat
Dawn Haigh	Principal Finance Officer (Schools)
Jonty Holden	Principal Finance Officer (Schools)
Emma Hamer	Strategic Manager, Intelligence and Sufficiency
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).**

### **680. DISCLOSURES OF INTEREST**

Emma Hamer declared an interest in all agenda items.

## 681. MINUTES OF 8 MARCH 2023 & MATTERS ARISING

The Business Advisor (Schools) reported on progress made on “Action” items from the 8 March meeting. He reported that:

- **Item 673 (Falling Rolls Fund):** The Falling Rolls Fund will be discussed further in the presentation of the latest information on the development of the National Funding Formula, which is presented under agenda item 8.
- **Item 675 (Letter to the Secretary of State):** The Forum resolved that the Chair, on behalf of the Schools Forum, writes to the Secretary of State primarily on the issue of the insufficiency of Early Years Block funding. Shortly after the last Schools Forum meeting however, the Government announced more funding for Early Years. The details of this are still to be provided but are imminently expected. So, the letter from the Chair has not yet been sent, as we are waiting for the details of the additional allocations, before framing its content. One aspect, in particular, that we will wish to contain in our letter will be influenced by the extent to which the additional funding is allocated across all local authorities or is (as we would argue it should be) weighted towards the local authorities, like Bradford, that have only received 1% increases in funding rates in 2023/24

The Business Advisor then reported on other matters arising:

- **Scheme for Financing Schools April 2023:** There were no directed revisions to the Scheme for April 2023 and therefore, our Scheme for maintained schools remains unchanged. It has been re-published only to amend Annex 1, which provides an updated list of schools maintained by the Local Authority on 1 April 2023.

**Resolved –**

- (1) That progress made on “Action” items and Matters Arising be noted.
- (2) That the minutes of the meeting held on 8 March 2023 be signed as a correct record.

## 682. MATTERS RAISED BY SCHOOLS

No matters were raised and no resolutions were passed on this item.

## 683. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS

No allocations were presented and no resolutions were passed on this item.

## **684. SCHOOLS FORUM MEMBERSHIP**

The Business Advisor (Schools) presented Document PV, which provided an update on the Forum's membership and composition and how the Local Authority will now seek to refresh the Forum's membership for September 2023. Members were asked to approve the proposed approach to the election of the Chair and Vice Chair of the Schools Forum for the 2023/24 academic year. Forum Members were also asked to consider and to approve Appendix 2 (the Forum's Conduct of Meeting and Procedures document).

Following the presentation of the report, the Chair expressed his appreciation to members for the work that they do and also asked members to encourage any school or academy colleagues that show an interest in the work of the Schools Forum to come forward.

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

### **Resolved –**

- (1) That the information provided in Document PV be noted.**
- (2) The Schools Forum approved the proposed approach to the election of the Chair and Vice Chair of the Schools Forum for the 2023/24 academic year.**
- (3) The Schools Forum approved Appendix 2 (Forum Conduct of Meetings and Procedures) for the 2023/24 academic year.**

**LEAD:**        *Business Advisor, Schools*

## **685. EARLY YEARS BLOCK AND EARLY YEARS ENTITLEMENTS – 15 MARCH BUDGET**

The Business Advisor (Schools) presented Document PW, which provided further details of the Government's 15 March 2023 Budget Statement: on the extension of the early years entitlements, on the allocation of additional Early Years Block monies for the delivery of the current entitlements from September 2023, and on the development of wrap-around provision in schools and academies.

He explained that the detailed information, which is required in order for us to decide our responses to the receipt of additional Early Years Block monies for the period September 2023 to March 2024, which is the most immediate matter, is still to be published by the DfE. We therefore, can only outline at this time how we anticipate these additional monies may be allocated and the wider matters that we need to consider. In its consultative role, we ask for views from the Schools Forum on this outline. He explained that the Authority anticipates presenting a report to the next meeting, which will begin to more closely consider the formula funding changes that may need to be made from, and the financial implications for the DSG and for the Early Years Block of, the extension of the early years

entitlements, beginning at April 2024. This will need to be worked through within our 2024/25 DSG and formula funding decision making cycle.

Following the presentation of the report, the Strategic Manager, Intelligence and Sufficiency, explained that the Authority has drafted a sufficiency and implementation plan for the delivery of the extended entitlements, though this needs to be informed by detailed guidance still to be provided by the DfE. She reported that the Authority is having many conversations with providers. One aspect of feedback from providers so far has been that, if the rate of Government funding is not sufficient to meet the cost of delivering the extended entitlements, providers may either opt out of delivery or may cap numbers, which may have implications for the overall sufficiency of places. Currently, the Authority assesses that we have sufficient places across the District, but this could be affected where providers opt out or cap numbers. The Strategic Manager also highlighted that the Authority will need to closely assess the impact of the entitlement extension on the early assessment of SEND and on the sufficiency of specialist places.

The Chair thanked the Strategic Manager for the work that her team is doing behind the scenes. He asked whether information on sufficiency is available for the Forum to consider. The Chair explained that he wishes the Forum, in its decision making, to have good information on which to take a strategic view about the use of DSG funding and the setting of provider funding rates, so that we, as part of managing the complexities, can avoid decisions that may have unintended consequences for the delivery of the extended entitlements going forward. The Strategic Manager responded that the Council's childcare sufficiency plan is published and that a link can be provided for the minutes, here:

<https://www.bradford.gov.uk/children-young-people-and-families/looking-for-childcare/childcare-sufficiency-assessment/>

The Chair also asked for clarification on whether the £204m for 2023/24 is a one-off or on-going sum. The Business Advisor responded that this is expected to be an on-going sum, though when the 7/12ths figure of £204m is grossed up for the full 2024/25 financial year, we might expect a greater figure than the £288m the DfE states, meaning that the on-going value that this additional funding may have may change.

The member representing special school academies commented that these are complex issues and sought to give some re-assurance that Forum members recognise that the landscape for early years providers is fragile.

**Resolved – That the information presented in Document PW be noted.**

## **686. SCHOOLS BLOCK 'HARD' NATIONAL FUNDING FORMULA 2024/25**

The Principal Officer (Schools) presented Document PX, which provided an update on the DfE's development of the 'hard' National Funding Formula for the Schools Block. He explained that this information is critical in our development of our 2024/25 DSG and formula funding proposals. It is also critical, as the DfE's SEND Green Paper improvement plan, which was published in March 2023,

places emphasis on changes associated with SEND and Alternative Provision funding being managed within the development of the hard National Funding Formula.

Following the presentation of the report, the Chair highlighted for members the summary points on page 34, regarding the implications of the DfE's announcement for the 2024/25 formula funding round, and encouraged members to talk to schools and academies colleagues about these.

A member representing academy special schools expressed concern that the financial position of schools and academies is very fragile, with depleting carry forward surplus balances, and that what appears to be coming in the next few years is very worrying, in terms of the impact that this will have on the quality of education. The Chair responded to acknowledge these concerns, and to explain that the Forum's roles are to help formulate a response, to help colleagues understand what may be coming in the future, and to support the development of a strategic management plan, working within the limitations that are present, such as the quantum of funding available.

**Resolved – That the information presented in Document PX be noted.**

#### **687. MAINTAINED SCHOOLS' OUTTURN (REVENUE BALANCES) 2022/23**

The Business Advisor (Schools) presented Document PY, which provided an overview of the position of revenue balances held by maintained schools at 31 March 2023.

The member representing the teaching trades unions, expressing concern that the financial situation for schools is bleak, asked the Business Advisor whether we have a sense of (whether we can calculate) the amount of additional funding that is needed in order to "resolve the problem". The Business Advisor responded to try to explain that this would be very difficult to calculate. The Chair, using the experience of his school and looking more widely the snap-shot of the value of balances held by schools at the end of the 2022/23 financial year, commented on the scale of growth in costs to school budgets over time, and the insufficiency of funding to match this growth over time, which has contributed to the current and future predicted situation.

**Resolved - That the information presented in Document PY be noted.**

#### **688. HIGH NEEDS BLOCK FINANCIAL FORECAST AND MITIGATION**

The Business Advisor (Schools) presented Document PZ. He explained that the Local Authority presented the latest version of the Authority's DSG Management Plan to the Schools Forum on 11 January 2023. Within this plan, the Authority stated that our forecast identifies that there is clear risk of a cumulative deficit building within our High Needs Block by the end of the 2025/26 financial year, as a result of recurrent structural in-year over spending, and that the risk of cumulative deficit by the end of the 2026/27 financial year is then high. We stated

that our forecast identifies that mitigating action will need to be taken in order to prevent the accrual of a cumulative deficit balance within our High Needs Block, and that this will be a piece of work for the Authority to discuss within the Schools Forum during 2023. We indicated that mitigating action will need to be considered within the 2024/25 DSG and formula funding decision making cycle. The Forum resolved on 11 January, that the Local Authority presents to, and discusses with, the Forum its 'mitigation plan', which is to be developed. Document PZ provides an update and presents the beginnings of the considerations behind the development of 'mitigating' actions, for the Forum's awareness and review.

Following the presentation of the report, the Chair reminded members that the Forum has previously asked for the Local Authority to develop a mitigation plan, as well as a clear strategy for the sufficiency and sustainability of SEND provision and of the High Needs Block. The Chair's suggestion, which was agreed by Forum members, was that a working group of members be convened, at the point the Authority has developed the draft, for the purpose of discussing and reviewing this. The Business Advisor indicated that such a group would be convened early in the new academic year.

The Strategic Manager, Intelligence and Sufficiency, reminded members that, had we been successful in our bid for a special school free school, that this school would not have established for 4-5 years and that the Authority already has in place a strategic plan for the creation of additional specialist places in the short to medium terms, which the Forum has previously received reports on. She did highlight however, that there have been no further announcements from the DfE regarding capital funding for local authorities, and that the sufficiency of capital funding is likely to remain a challenge.

Responding to the report, a member representing academy special schools expressed concern regarding the significant pressures and challenges that schools and academies currently face, and that the DfE's SEND Green Paper only represents a longer term programme of change (not a fix for current issues, which are serious).

Responding to the aspect of the report, which discusses the transfer of monies from mainstream schools and academies (from the Schools Block) to the High Needs Block, an academies member asked whether top slicing schools and academies would just serve to make existing financial stresses worse. Another academies member emphasised that, for schools and academies that are currently on the Minimum Funding Guarantee or Minimum Levels of Funding, top slicing budgets would be very difficult to manage. The Business Advisor responded to explain that he did not foresee that transfer would be an option that would be considered for 2024/25, and also that we need to further consider, as part of the development of the plan, the future conditions under which a transfer would be agreed. He stated that he envisaged that transfer would usually only typically be actioned where mainstream schools and academies directly benefit in return e.g. the transferred funding pays for additional High Needs Block investment that goes back into primary and secondary schools and academies e.g. relating to inclusion or supporting early intervention and alternative provision, or where the funding is used to avoid ceasing or reducing a current High Needs Block funded activity that the mainstream sector benefits from.

**Resolved –**

**(1) That the information presented in Document PZ be noted.**

**(2) That a working sub group of Schools Forum members be convened at the point that the Local Authority has developed a draft (or outline) of a strategic mitigation plan.**

**LEAD:           *Business Advisor, Schools*  
*Assistant Director, SEND and Inclusion***

#### **689. SCHOOLS FORUM STANDING ITEMS**

No matters were raised and no resolutions were passed on this item.

#### **690. AOB / FUTURE AGENDA ITEMS**

Forum members welcomed David Johnston's invitation to make a presentation to a future Forum meeting on the work of the Children's and Family's Trust.

#### **691. DATE OF NEXT MEETING**

The next scheduled is Wednesday 12 July. This meeting will be held remotely.

For planning purposes, the provisional schedule for Schools Forum meetings for the 2023/24 academic year has now been set, as follows:

- Wednesday 13 September 2023, 8am
- Wednesday 11 October 2023, 8am
- Wednesday 6 December 2023, 8am
- Wednesday 10 January 2024, 8am
- Wednesday 17 January 2024, 8am PROVISIONAL MEETING
- Wednesday 6 March 2024, 8am
- Wednesday 22 May 2024, 8am
- Wednesday 10 July 2024, 8am

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