

Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum on 10 January 2024

Schools Forum meeting held remotely on Wednesday 6 December 2023

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

Commenced 08:00
Concluded 10:50

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
Amanda Slaney	Academies Member
Rowena Dixon	Academies Member
Matthew Hill	Academies Member
Brent Fitzpatrick OBE	Academies Member
Sarah Murray	Academies Member
Melanie Saville	Academies Member
Helen Williams	Academies Member
Michael Thorp	Academies Member
Isabel Peat	Academies Member
Richard Bottomley	Academies Member – Alternative Provision Academies
Lyndsey Brown	Academies Member - Special School Academies
Bev George	Maintained Nursery Schools – Governor
Sian Hudson	Maintained Nursery Schools - Headteacher
Gareth Baterip	Maintained Primary Schools - Headteacher
Kathryn Swales	Maintained Primary Schools - Headteacher
Victoria Merriman	Maintained Primary Schools - Headteacher
Helen Willett	Maintained Special Schools

APOLOGIES RECEIVED

Member	Membership Group
Victoria Birch	Academies Member
Jonathan Nixon	Academies Member

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Jon Skurr	Academies Member
Wahid Zaman	Academies Member

Graham Swinbourne	Maintained Primary Schools - Headteacher
Kirsty Ratcliffe	Pupil Referral Unit (maintained)

Non-Schools Members

IN ATTENDANCE

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

APOLOGIES RECEIVED

Member	Membership Group

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

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
Asad Shah	Committee Secretariat
Sue Lowndes	Assistant Director for Schools
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 75% of members present (21 out of 28 currently filled membership positions).

727. DISCLOSURES OF INTEREST

Ashley Reed and Helen Williams declared interests in agenda item 5 (Growth Fund allocations).

Richard Bottomley declared an interest in agenda item 13 (Annual SEND Sufficiency Statement).

728. MINUTES OF 11 OCTOBER 2023 & MATTERS ARISING

In introducing the meeting, the Chair welcomed Victoria Merriman and Gareth Baterip as new members of the Forum. He explained that:

- This is the meeting immediately preceding the main annual recommendations and decisions meeting to be held on 10 January. The main purposes of this meeting are to:
 - Ensure that Members have sufficient information on which to make their recommendations on the allocation of the DSG and formula funding arrangements for 2024/25 on 10 January. This is the last opportunity that Members have to ask for clarification / further information.
 - Review the feedback received from the consultations on mainstream and high needs formula funding arrangements.
 - Highlight that the DfE has just announced the Early Years Block settlement for 2024/25 and that we are working to go out to consultation in January. We have provided an update under agenda item 7, which will be added to verbally (as the DfE's announcement came after the report to the Forum was written).
 - Consider the DSG's forecasted spending position for 2023/24.
 - Consider further information on high needs, including the SEND Sufficiency Statement.
 - Consider further information on centrally managed funds.
- Under each agenda item, the Chair explained that members are asked to think about whether they feel they have sufficient information and if not, to identify areas for clarification. He encouraged members to not be afraid to ask questions and also to not assume that other members fully understand the matter that you may wish to investigate further.

The Business Advisor (Schools) reported on progress made on "Action" items from the 11 October meeting. He reported that:

- **Item 720 (Schools Block consultation)** – The consultation document was published, and an outcomes report is presented to the Forum under agenda item 8. A letter was sent to the Secretary of State for Education on 18 October on the revision of the 2024/25 National Funding Formula and Schools Block settlement. A copy of this letter is included within the agenda pack. A response was chased on 28 November. We have not yet received a response directly from the Minister. However, our letter was copied to the District's MPs and Philip Davies MP responded that he would also take this matter up with the Minister and we have received a response via this route. A copy of the response will be circulated to Forum members for their information.
- **Item 721 (High Needs Funding consultation)** – The consultation document was published, and an outcomes report is presented to the Forum under

agenda item 10.

The Business Advisor then highlighted for members the additional matters arising document that is contained with the reports pack, which provided an update on a number of important matters that are not picked up within other agenda items. In particular, the Business Advisor explained that the Authority has received an additional £0.934m of DSG this year specifically to support maintained schools in deficit / that are facing financial difficulty. The report explained how the Authority anticipates managing this funding and that a report to the Forum will be presented in March.

Resolved –

(1) That progress made on “Action” items and Matters Arising be noted.

(2) That the minutes of the meeting held on 11 October 2023 be signed as a correct record.

729. MATTERS RAISED BY SCHOOLS

The Business Advisor (Schools) reported a matter that has been raised by the Vice Chair regarding the Local Authority’s communication with secondary schools and academies on the admission of bulge classes into year 7 at September 2024 and the provision of growth fund information to schools / academies that have agreed to admit classes in order to support their forward budget planning. The Business Advisor explained that a communication will shortly be sent out to schools / academies that have agreed to admit bulge classes, which will include information that will support budget planning. School Funding Team will also shortly be provided with information regarding the schools / academies that are expected to take bulge classes, and schools / academies can communicate with this team further on estimated growth fund allocations. The Academies Member representing special schools added that it is important that members remain aware that growth is also expected in the special schools sector. The Chair thanked the member for this clarification.

730. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS

The Business Advisor explained that, due to 6 growth fund allocations still being estimated (due to the later release of October 2023 census information), it would make better sense for this item to be fully deferred to the 10 January meeting, when an updated report can be presented, which will set out final confirmed allocations. In particular, now that we have access to the October 2023 census pupil numbers for all academies, two academies that are listed on the report to the meeting today as receiving estimated allocations will not now actually receive growth funding.

The Chair asked members whether deferring this item to the 10 January would create any operational problems and it was confirmed that this wouldn’t.

No resolutions were passed on this item (this is deferred to 10 January).

731. BRADFORD CHILDREN AND FAMILIES TRUST

The Executive Director, Social Care and Practice, attended the Forum to present an overview and update on the work of the Children and Families Trust.

The Executive Director introduced the 3 key areas of focus for the Trust: the stability of the workforce (including a strong recruitment campaign and establishing a strong spine of leadership); improving social workforce practice (including a focus on 'doing the simple things well'); and reducing the need for children to come into care / to come into any statutory intervention (including the relaunch of restorative practice and the edge of care service).

The Executive Director then explained the 5 key priorities of the Trust in relation to social care services, as set out in the Trust's business plan: strengthening services to provide early help; improving the quality of relationship-based practices; better choices for local care (sufficiency strategy); empowering children and families; and stronger partnerships (including partnerships with schools).

The Academies Member representing special schools expressed her thanks to the Executive Director and highlighted that she is very interested in the edge of care service, which she has not really heard about. The member asked how key developments and service information are / will be communicated and how perhaps this communication could be strengthened, especially for colleagues in mainstream schools and academies. The Executive Director responded that communication is taking place within various forums and also with the DAP and that the Trust would very much welcome further input into how to strengthen communication.

The Chair thanked the Executive Director for her presentation and asked about how the relationship between the Trust and the education and SEND strands of Bradford Council are organised. The Executive Director responded that strong relationships have been established and are very important, especially as the Trust and the Council seek to develop early help and prevention. There are formal structures for this relationship. The Trust is responsible to the Council. The Chair thanked the Executive Director for this response and asked that the Forum receives updates on the work and development of the Trust going forward.

Resolved – That the information presented be noted and that the Executive Director, Social Care and Practice, be thanked for their presentation.

732. EARLY YEARS BLOCK SETTLEMENT & EYSFF CONSULTATION 2024/25

The Business Advisor (Schools) presented a report, Document QN, which provided an update on Early Years Block formula funding matters. He explained that the DfE announced the 2024/25 Early Years Block funding rates and operational guidance on 29 November and that we are now working to present a

consultation document to the Forum's meeting to be held on 10 January. On this basis, we expect that our period of consultation on the 2024/25 Early Years Single Funding Formula will need to extend beyond the 10 January (the meeting at which the Schools Forum makes its recommendations on the 2024/25 DSG and formula funding arrangements). As we have done in the last few years therefore, we anticipate presenting to the Forum on 10 January a planned Early Years Block budget for 2024/25, which will be based on assumptions and estimates that are made prior to the completion of our consultation.

The Business Advisor provided verbally some indicative information regarding the Early Years Block settlement. He explained that a key issue still is the potential for our Early Years Block in 2024/25 to have to cover the cost of 4 weeks of delivery of the new under 2s entitlement, which currently appears to be unfunded by the DfE. The Business Advisor explained that he is meeting with the DfE today to discuss this issue. If this issue is not resolved, unfunded delivery will be a significant call on the Early Years Block / on Early Years Block reserves in 2024/25 and again in 2025/26.

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

Resolved – That the information presented in Document QN be noted.

733. CONSULTATION OUTCOMES – SCHOOLS BLOCK FORMULA FUNDING 2024/25

The Business Advisor (Schools) presented the report, Document QO, which asked Members to consider the feedback received to the consultation on our 2024/25 Schools Block formula funding arrangements and Schools Block centrally managed funds.

The Business Advisor explained that, in presenting to various groups, the Authority did not receive any negative comments expressed in real time. The Authority's view is that the proposals should now go forward for recommendation on 10 January. The Chair prompted members to consider whether they now have sufficient information on which to make their recommendations on Schools Block formula funding. He asked members to share any feedback that they may have collected as a result of their conversations with school colleagues.

An Academies Member, reflecting on the number of formal responses, asked whether the Authority is happy with the low response rate and whether further actions can be taken in the future to improve this. The Business Advisor responded that a low number of formal responses is consistent with the position in recent years and is likely indicative of the 'level of comfort' that schools and academies have with the Authority's proposals and that these proposals have not been particularly contentious (continuing to mirror the National Funding Formula). He explained that the Forum has previously discussed the low response rate and the Authority has taken additional steps, including attendance at various important groups. The Forum has also previously discussed how Members themselves can help to support our consultative processes. We will continue to consider what

alternative / additional approaches we can take to increase the number of formal responses.

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

Resolved – That the information and consultation responses that were presented in Document QO be noted. Forum members did not ask for further information to be provided to support final recommendations to be made on 10 January.

734. INDICATIVE BUDGETS 2024/25 PRIMARY & SECONDARY SCHOOLS AND ACADEMIES

The Business Advisor (Schools) presented a report, Document QP, which provided Forum Members with updated indicative modelling of mainstream Primary & Secondary formula funding delegated budget shares for 2024/25, now using the pupil numbers taken from the October 2023 Census in most schools (but with 41 academies still based on previous pupil number estimates due to October 2023 census data not being available at the time the Forum reports were finalised). This modelling is tabled only for information at this stage, prior to asking Members to make final recommendations on 10 January.

Members did not ask any questions and did not make any comments.

Resolved – That the modelling information that was presented in Document QP be noted. Forum members did not ask for further information to be provided to support final recommendations to be made on 10 January.

735. CONSULTATION OUTCOMES – HIGH NEEDS BLOCK FORMULA FUNDING 2024/25

The Principal Finance Officer (Schools) presented a report, Document QQ, which asks Forum Members to consider the feedback received to the consultation on the 2024/25 High Needs Funding Model.

The Principal Officer explained that, in presenting to various groups, the Authority did not receive any negative comments expressed in real time specifically about the proposals themselves. Some feedback, as in previous consultations, expressed concerns about the general adequacy of SEND funding.

The Authority's view is that the proposals should now go forward for recommendation on 10 January. The Chair prompted members to consider whether they now have sufficient information on which to make their recommendations on high needs funding. He asked members to share any feedback that they may have collected as a result of their conversations with school colleagues. Members did not have any questions and did not make any comments on the report.

Resolved – That the information and consultation responses that were

presented in Document QQ be noted. Forum members did not ask for further information to be provided to support final recommendations to be made on 10 January.

736. 2024/25 DSG UPDATE

The Business Advisor (Schools) presented the report, Document QR, which provided a summary-level indicative forecast of the Dedicated Schools Grant (DSG) income / expenditure position for the 2024/25 financial year.

Within the presentation, he emphasised that, on current estimates, we will need to use the majority of the High Needs Block surplus balance that is forecasted to be held at the end of 2023/24 in order to set a planned budget that avoids our DSG account falling cumulatively into deficit by the end of the 2024/25 financial year. He explained that there are potentially other significant calls on surplus balances, especially within the Early Years Block as a result of the 4 weeks underfunding issue, but it is the forecasted overspending within the High Needs Block that is the controlling feature of the 2024/25 DSG planned budget. He also explain that, although the report indicates a £17.5m overspend in the High Needs Block, estimates of this overspend now are higher than this, especially as a result of factoring in some response to the growth in the number of permanent exclusions. The Academies Member representing Alternative Provision asked whether and how the development of the 3 tiers AP approach is built into the forecast, alongside the current pressure for places. The Business Advisor responded that he did not see that the cost implications of the 3 tiers approach is reflected yet in this forecast and that this will be an area of further work. Essentially, our forecast just continues to include provision for the 3rd of the 3 tiers, responding to the significant increase in permanent exclusion numbers. The Member expressed concerns generally, especially from the perspective that we are an early pilot authority. He explained that we need to be careful to avoid any unintended consequences in relation to our management of permanent exclusions and of the DfE's reforms.

The Business Advisor explained that a sub-group meeting of a small number of Forum members took place in November to begin to discuss High Needs Block mitigation activity, and that this group will continue to meet. It is clear that there is much to discuss in relation to mitigation, in seeking to reduce the size of the forecasted overspend in 2024/25 as well as seeking to reduce the growth of overspending from 2025/26 onwards (from which point our forecast says that we will be cumulatively in deficit in our DSG account). The Business Advisor explained that Bradford already appears to employ the majority of the mitigating actions we are aware of that the DfE has put forward to the local authorities that are currently within the national Safety Value and Delivering Better Value intervention programmes. Therefore, whilst there are mitigating actions that we can and must consider, such as re-introducing a Schools Block to High Needs Block contribution from April 2025, it is not currently clear how the mitigating actions that we can take will be sufficient to resolve the size of the deficit that we are forecasting, based on what feels to be a reasonable assumption that the rate of growth in demand for EHCPs and specialist places in Bradford will not reduce over the next couple of years (and may in fact continue to increase). This is going

to be a very challenging position for the Council and the Schools Forum to manage.

The Chair responded to give his perspective on this serious situation. He re-affirmed that the immediate task is to set a planned budget for 2024/25 which balances, in the sense that our DSG account is still cumulatively in surplus at the end of the 2024/25 financial year, albeit that this will be reliant on the deployment of the majority of our carry forward High Needs Block surplus balance. The Chair also highlight that, when considering a possible Schools Block to High Needs Block contribution as part of mitigation activity, we do need to recognise and to carefully consider that schools currently are spending significantly on alternative provision from their own budgets (the Chair offered that his school spends £230k a year on alternative provision and preventative support).

The Member representing the Teacher Trades Unions asked whether the scale of growth in the number of EHCPs in Bradford is the result of us catching up to national trends or is the result of schools seeking more EHCPs as a way of gaining access to additional funding (in the context of schools being underfunded more generally for the cost pressures that they face). The Business Advisor responded to provide some statistics on Bradford's, national and regional growth in EHCPs over the last 4 years. He stressed that these statistics will be included in the updated DSG management plan that will be presented on 10 January. The statistics evidence that this growth is very much a national trend and that Bradford's growth is actually a little lower than has been found nationally. This is one of the factors of concern; that the potential for continued growth is greater in Bradford than it is elsewhere. The Chair offered the view that parental preference, more so than schools, is perhaps driving growth in EHCPs nationally.

Referring to the approach that is taken in Leeds, a Member representing Maintained Primary School Headteachers asked whether how we fund EHCPs is very different from other local authorities and whether this is a reason why we are under pressure. The Business Advisor responded to acknowledge that how we fund is very different from the approach taken in Leeds, and that some authorities do fund EHCPs based more on a specific individual calculation, but he suggested that the general consensus, and the view that is put forward by the DfE (linking with the DfE's plan to adopt a national banded model as part of the national SEND reforms) is that banded models are a good way that authorities can approach the funding of EHCPs. We have used a banded model for a number of years, and we know that many other authorities also use this. The key question then in this context is whether the rates of funding that we apply to our banded model are significantly different from those in other authorities. It is difficult to clearly benchmark this, but our view from sampling and anecdotal information is that our banded model is 'middling to generous' when compared with other models.

Resolved – That the information that was presented in Document QR be noted. Forum members did not ask for further information to be provided to support final recommendations to be made on 10 January.

737. 2023/24 DSG SPENDING AND CARRY FORWARD BALANCES FORECAST

The Business Advisor (Schools) presented the report, Document QS, which updated members on the forecasted spending positions of each of the DSG Blocks against the 2023/24 planned budget. This document gave members a view of the estimated values of balances to be carried forward into 2024/25 and a view of the uses of these balances. The Business Advisor explained that these forecasts will be updated and re-presented for final decision / recommendation on 10 January.

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

Resolved – That the information that was presented in Document QS be noted. Forum members did not ask for further information to be provided to support final recommendations to be made on 10 January.

738. ANNUAL SEND PLACES SUFFICIENCY STATEMENT

The School Organisation and SEND Sufficiency Manager presented a report, Document QT, which is the annual statement to the Schools Forum on the sufficiency of specialist places for SEND. This statement was presented as per the schedule of high needs information, which was agreed with the Schools Forum on 14 October 2020. It was presented in advance on an update of the fuller DSG Management Plan, which will be presented on 10 January.

The Manager explained that the number of applications for assessment for EHCPs continues to increase, meaning that the trajectory for the Bradford District remains unchanged, with a continued increase in demand for Special Educational Needs and Disabilities (SEND) provision. The Authority's current projection remains unchanged on that previously presented to the Forum, in that the Authority forecasts that we will require an additional 100 to 120 specialist places within the current 2023/24 academic year, with these places being delivered across both the special school sector and within resourced provisions. The Authority's projections then further show, as we have previously presented, that we will need to increase specialist places again by 100 to 120 for the 2024/25 academic year. This is the minimum number of specialist places that we project will be required to be developed in order to meet demand and to control (not increase reliance) on more expensive 'out of authority' placements.

Responding to the report, the Academies Member representing Alternative Provision asked whether a similar piece of sufficiency forecasting has taken place for Alternative Provision places. This is in the context of the significant increase in the number of permanent exclusions last year and in the number of places that are needed now in order for the Authority to meet its statutory 6th-day provision responsibilities. The Sufficiency Manager responded that Alternative Provision sufficiency is unfortunately not within her remit, so she is not able to answer this question. The Business Advisor responded that he will take this question back to the Assistant Director, Access and Inclusion and ask that further information be provided to the Forum.

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

Resolved –

(1) That the information that was presented in Document QT be noted.

(2) That further information be provided on the Authority’s sufficiency planning for alternative provision (permanent exclusion).

739. CENTRAL SCHOOLS SERVICES, EARLY YEARS & SCHOOLS BLOCK FUNDS

The Business Advisor (Schools) presented the report, Document QU, which asked Forum Members to further consider the Authority’s proposals for retention of Schools, Central Schools Services and Early Years Block central and de-delegated items in the 2024/25 financial year, following the initial discussion had in the last Forum meeting and in advance of the 10 January.

The Business Advisor took members through the changes, updates and confirmations since the report was presented to the 11 October meeting, which includes some changes to de-delegation in the Schools Block and recommendations for increases in 2024/25 to central retention in the Early Years Block, responding to the delivery of the new early years entitlements and the pressures within early years SEND services to which the Early Years Block contributes. The Business Advisor explained that these proposals will be re-presented for final decision / recommendation on 10 January.

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

Resolved – That the information that was presented in Document QU be noted. Forum members did not ask for further information to be provided to support final recommendations to be made on 10 January.

740. SCHOOLS FORUM STANDING ITEMS

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

741. AOB / FUTURE AGENDA ITEMS

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

742. DATE OF NEXT MEETING

Please see the published schedule of meetings – the next Forum meeting is scheduled for Wednesday 10 January (City Hall).

A provisional meeting is scheduled for Wednesday 17 January (if this is needed to complete 2024/25 DSG recommendations).

For planning purposes, the provisional schedule for Schools Forum meetings for the 2024/25 academic year has now been set, as follows:

- Wednesday 11 September 2024, 8am
- Wednesday 9 October 2024, 8am
- Wednesday 4 December 2024, 8am
- Wednesday 15 January 2025, 8am
- Wednesday 22 January 2025, 8am PROVISIONAL MEETING
- Wednesday 12 March 2025, 8am
- Wednesday 21 May 2025, 8am
- Wednesday 9 July 2025, 8am

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