

Schools Forum Decision Sheet, Draft & Final Minutes

Thursday, 14 December 2023

4.30 pm – 6.30pm Virtual - Microsoft Teams

For more information contact: janita.aubun@lewisham.gov.uk tel: 020 83147030

Item	Pages
1. Decisions of Schools Forum Meeting 14 December 2023 Summary of key decisions made.	1
2. Draft Minutes of Meeting 14 December 2023	2 - 7
3. Minutes of Meeting 14 December 2023 - FINAL	8 - 13

Schools Forum - Decision Sheet

Meeting Date

14/12/23

Report Reference	Page Reference	Report Title	Purpose of Document	Recommendation	Schools Forum Decision
Item 1		Apologies and Acceptance of Apologies.	To include any apologies of absence, any new member appointments.	Apologies from Pat Barber (Governor - Secondary) and Michael Sullivan (Headteacher - Secondary).	Apologies accepted & noted.
Item 2		Declaration of Interests		None	
Item 3		Election of Vice Chair	Nominations and vote.	1 nomination received.	1 nomination received from Niall Hand (Secondary Head). There were no objections; Niall Hand, elected to forum Vice Chair with immediate effect. Chair thanked Niall for his participation.
Item 4	page 1 - 8	Minutes of the Meeting 19 October 2023	To agree on minutes of previous meeting	Questions or comments from the last meeting.	Forum minutes agreed as accurate.
Item 5		Matters Arising		<ul style="list-style-type: none"> Letter to be drafted to the Secretary of State regarding 2024/25 DfE funding allocation error. PFI factor Consultation - outcome. Training for new Head teachers - postponed till New Year. Revision of Schools Forum Constitution and update for movements in pupil numbers and also academisation. 	To postpone letter draft to Secretary of State and put this on hold for the time being. Position to be reviewed/ reassessed following year-end. PFI factor Consultation - outcome - thank you to Niall Hand for co-ordinating and leading on this work. Schools forum constitution - membership to be recast for January 2024 forum.
Item 6	page 9 - 16	Dedicated Schools Grant 2024/25	Report to discuss a mandate for developing the 2024/25 Schools funding formula. A standard report to forum to manage in principle, agreements once the settlement is announced (expected circa 20th December 2023). Also information regarding notional SEN.	<p>I. Continuation with the National Funding Formula in the deployment of the Schools Block.</p> <ul style="list-style-type: none"> Including changes previously advised and appropriate implementation - in particular relating to split sites. Note that the exceptional factor usage for St Michaels and Bonus Pastor is pending – submission has been made to the DfE. Note request for exceptional factors has been submitted to DfE in respect of Playing Field management and Service Charge costs. ii. Agree any growth funding, be included on the APT tool, to determine amount in the Growth Fund Budget to fund incremental support for bulge class and potentially any unplanned in-year growth/bulges. Any unused funds, to be held in the Growth Fund. iii. De-delegation to be in line with the current basis plus inflation (where appropriate). Consider two options for MFG: <ul style="list-style-type: none"> Option one- MFG set at max 0.5% (estimate), with any residue to support pressures in HNB. Option two- 0.5% transfer from Schools Block, followed by MFG set at affordability. Option three- depending on the financial settlement, it may be necessary to provide a hybrid model of options one and two. V. Review of the PFI factor:- <ul style="list-style-type: none"> Conclusion of the consultation. <p>Continuation of financial risk associated with High Needs (demand led), Early Year (EY) (numbers accessing free entitlement), pressure on schools arising from economic challenges and national policy. Schools' forum also asked to note and agree to receive further updates as more information is made available at the January meeting and the Summer meeting.</p>	Schools Forum noted all recommendations. Members also noted the financial settlement is unlikely to be known until around 20th December 2023. For this reason, there could potentially be a delay to the reports dispatch process. Notional SEN - officers to bring a list of each school to January meeting, for information. 2 possible models of APT to be developed for forum consideration.
Item 7	page 17 -22	Application of the Quality Factor of Early Years Funding Block 2023/24	Report to discuss and agree the method on how to distribute the quality factor. This was largely a repeat of the report presented at forum in October, updated for additional option requested by the nursery schools representative.	Following Schools Forum on 19th October it was highlighted that maintained nursery schools employ a greater number of qualified teachers than nursery classes in primary schools or PVLs due to requirements that apply to schools and because all pupils attending will be under statutory school age. The three options presented did not take this into consideration, therefore a 4th option has been added for consideration and decision. Calculation is to divide the total funding £372,000 by the number of qualified teachers i.e. 123. This would mean the allocation per qualified teacher working in nursery provision would be £3,024.39.	11 voted in agreement for option 4 which is a majority vote carried.
Item 8	page 23 -25	Additional Funding for Schools in Deficit	Report to discuss the potential criteria on which to allocate funding to support maintained schools in financial difficulty (2023 to 2024).	<p>Forum is asked to note the content of this report that focuses on:-</p> <ul style="list-style-type: none"> Criteria for supporting schools that are currently in a deficit budget, in line with the grant conditions supporting this funding. To note this is one off funding which must be allocated to schools by the 31st March where they meet the criteria. Allocation of funding must remain within the overall funding provided by the DfE. 	Forum noted report - Agreed to have a final outcomes report to forum with headlines. Head of Lewisham Learning to lead on this process with appropriate schools approached to draft short business case. Trade off between having a over complex allocation method, recognising this is one off funding. funding should not be used to build reserves.
Item 9		High Needs Block	Verbal update including presentation to Forum regarding the grant submission to the DfE for potential £1M to support actions anticipated to support the reduction of cost to the HNB.	Verbal update - slides to be shared following the meeting.	<p>Forum noted the following:-</p> <ul style="list-style-type: none"> Grant application to be submitted by 21.12.23. Verification and Quality Assurance by Newton - end Dec 23/ early Jan 24. DfE SEND Advisor and Vulnerable Children's Unit Representatives as well as CIPFA reviewing grant application and evidence- continues verification process. Outcome of grant application communicated - March 2024. Delivery of the DBV Implementation Programme commenced fully at the start of the academic year (September 2024), with clear milestones set for monitoring purposes. Summary position to be brought to the January forum.
Item 10		Any other Business	None.	None.	

Agreed by Manda George

Chair of Schools Forum

DRAFT

LEWISHAM SCHOOLS FORUM

Minutes of the meeting held on Thursday 14th December 2023

Membership (Quorum = 40% i.e. 7) ✓ = present ✕ =absent a = apologies
s = substitute

		Attendance				
		01/ 02	29/ 06	19/ 10	14/ 12	Date of Appointment
Primary School Headteachers						
Manda George	Torridon Primary	a	✓	✓	✓	Jan 2022
Sharon Lynch	St William of York	✕	✓	✓	✓	Jan 2022
Julie Loffstadt	Kilmorie	✓	✓	a	✓	Jan 2022
David Lucas	Trinity	✓	✓	✓	x	Jan 2021
Maxine Osbaldeston	Launcelot	✕	✓	a	✓	Jan 2021
VACANT	PRIMARY SCHOOL					
VACANT	PRIMARY SCHOOL					
Nursery School Headteacher						
Cathryn Arnold-Kinsey	Clyde Nursery	✓	✓	✓	✓	Jan 2022
Secondary School Headteachers						
Naill Hand	Prendergast Ladywell	✓	✓	✓	✓	Oct 2022
Michael Sullivan	Forest Hill	✓	✓	a	a	Oct 2022
Special School Headteacher						
VACANT	SPECIAL SCHOOL					
Pupil Referral Unit Headteacher						
Heather Johnston	Abbey Manor	✓	✓	✓	✓	Jan 2023
Primary School Governors						
Daniel Meyer	St Bartholomews	✓	✓	a	x	Jan 2022
Peter Fidel	Eliot Bank and Gordonbrock Federation	✓	✓	✓	✓	June 2021
Secondary & Special School Governors						

Pat Barber	Bonus Pastor	✓	a	✓	a	Jan 2022
Andy Rothery	Leathersellers Federation	✓	✓	✓	✓	June 2021
VACANT	SPECIAL SCHOOL					
Academies						
VACANT	ACADEMY					
Ann Butcher	Childeric	✓	✓	✗	✓	June 2021
14-19 Consortium Rep						
Jamie Stevenson	Lewisham College			a	✓	Oct 2023
Early Years – PVI						
Melanie Simpson	The Village Montessori	a	✓	✗	✓	Jan 2023
Diocesan Authorities						
VACANT	Southwark Diocesan Board of Education (Church of England)					
Yvonne Epale	Education Commission – Catholic Diocese of Southwark	a	✗	✓	x	May 2021

Observers/Others in attendance		
Strategic Business Partner	Mala Dadlani	
LB Lewisham - Finance	Lurenco Reynolds-Moxam	
LB Lewisham - Finance	Floyd Roberts	
LB Lewisham – Head of Early Years	Nikki Sealy	
LB Lewisham - SEND	Reinhild Onuoha	
Lewisham Learning	Anthony Doudle	apologies
Unison	Justine Canady	
NEU	James Kerr	
Clerk	Janita Aubun	

1. Apologies and Acceptance of Apologies/ Welcome new members/Member Resignations

Apologies accepted from Pat Barber (Secondary Governor) and Michael Sullivan (Secondary Headteacher). Apologies also received from Anthony Doudle – LB Lewisham Learning.

2. Declaration of Interests

No declarations of interest.

3. Election of Vice-Chair

Forum Chair invited nominations for the vacant position of Vice-Chair. 1 nomination received – Niall Hand (Secondary Head). No objections hence Niall elected as Forum Vice-Chair, commencing immediately. Niall was given thanks for his support to Forum – a great asset.

4. Minutes of the Meeting – 19th October 2023

Questions and comments invited. Minutes agreed as accurate.

5. Matters Arising

Drafting of the letter to the Secretary of State regarding 2024/25 DfE funding allocation error – this is to be postponed and put on hold for the time being. Position to be reviewed following year-end i.e. post March 2024

Schools Forum training for new headteachers - postponed until New Year.

PFI factor consultation with schools - outcome - thank you to Niall Hand for co-ordinating and leading on this work.

Revision of Schools Forum membership - For consideration at the January meeting following finalisation of Census Data.

6. Dedicated Schools Grant 2024/25

Forum informed that next week (circa 20th December), we will receive the funding settlement. Officers will undertake detailed review including the submission of the APT tool.

Key purpose of this meeting is to agree the principles under which the APT should be produced.

Mala noted the following, which forum members supported:-

Agreed –

- The Lewisham Funding formula submission will be based on the NFF (i.e. The values in full for each allowable factor)
- Including changes previously advised and appropriate implementation - in particular relating to split sites.
- Exceptional Factors – There are currently two exceptional factors that form part of the Lewisham funding formula. Schools’ forum will be aware that the exceptional factor relate to
 - Playing Fields Managed by Bonus Pastor circa £166.9k and Service Charge payment for St Michaels of £23.5k
 - Schools Forum will recall that for 2023/24, DfE agreed to the disapplication requests and advised an annual disapplication request was not required. However, this position changed with the focus on the hard formula. The DfE has now advised Lewisham that a disapplication would be required for 2024/25. This has been submitted to the DfE on the basis that schools forum continue to support the request. Schools forum agreed to the submission of the disapplication requests.
 - Schools Forum to further note that at present, we await a decision from DfE on the disapplication which therefore remains a risk -both schools are made aware.
 - Agree any growth funding be included on the APT tool, to determine amount in the Growth Fund Budget to fund incremental support for bulge class and

potentially any unplanned in-year growth/bulges. In the event that the funds are not required; any unused funds, to be held in the Growth Fund for future use.

- De-delegation to be in line with the current basis plus inflation (where appropriate) as detailed in the report. noted that de-delegation can only apply to maintained schools. Lewisham has 6 schools converting over the course of the next 6 months, so there will be a likely impact on the value of de-delegation.

Schools Forum noted the DfE position of MFG between 0 to 0.5%. further agreed that Officers would provide 3 options for consideration subject to affordability.

- Option one- MFG uplift be set at max 0.5%, with any residue to support pressures in HNB.
- Option two- 0.5% transfer from Schools Block, followed by MFG set at affordability (likely to be near 0%) , assuming this complies with the 0.% MFG (as minimum)
- Option three- depending on the financial settlement, it may be necessary to provide a hybrid model of options one and two. Forum to recognise the ongoing pressure on the HNB and to further note the joint responsibility of managing DSG.
- PFI -confirmation of 20% lump sum and 80% targeted.
- Continuation of financial risk associated with High Needs (demand led), Early Year (EY) (numbers accessing free entitlement), pressure on schools arising from economic challenges and national policy.
- Schools' forum also asked to note and agree to receive further updates as more information is made available at the January meeting and the Summer meeting.

Forum advised of typo in paragraph 5.2 of the report. 3.88% uplift should read 5%.

7. Application of the Quality Factor of Early Years Funding Block 2023/24

Following on from the 19th October Schools Forum, members were presented with a fourth option (additional option as requested by the nursery schools sector), to take into consideration maintained nursery schools employing a greater number of qualified teachers than nursery classes in primary schools or PVI's. Schools forum agreed the use of the 4th option for allocation of the quality factor.

Forum was reminded that this funding is that which was streamlined into the DSG in the beginning of the year; not to be confused with the Teachers Pay Award nor the TPAG for 2023/24

Outcome: -

- 11 members voted in agreement for Option 4, i.e. majority vote carried.

8. Additional Funding for Schools in Deficit

This report looked at a potential criteria on which to allocate this one-off funding to support maintained schools in financial difficulty. Maintained schools does also include nursery schools and special schools.

Forum noted the report.

- Agreed to have a final outcomes report to forum for scrutiny with headlines – not likely for January 2024 meeting though. Head of Lewisham Learning to lead on this process with applicable schools approached to draft short business case. Trade off between having an over complex allocation method, recognising this is one off funding. Funding should not be used to build reserves.

9. High Needs Block

Verbal update by Head of Integrated SEND Services for Children & Young People. Slide presentation which is to be shared with members, following the meeting. Forum updated on the grant submission to the DfE for potential £1M to support actions anticipated to support the reduction of cost to the HNB.

Forum noted the following:-

- Grant application to be submitted by 21.12.23 following extension (due to ILACS inspection)
- Verification and Quality Assurance by Newton – programme to end Dec 23/ early Jan 24.
- DfE SEND Advisor and Vulnerable Children's Unit Representatives as well as CIPFA reviewing grant application, deficit management plan and evidence- continues verification process.
- Outcome of grant application communicated - March 2024, LA will have 18 months to effectively use this funding in line with agreed implementation plan.
- Delivery of the DBV Implementation Programme commenced fully at the start of the academic year (September 2024), with clear milestones set for monitoring purposes.
- Summary position to be brought to the January forum; bid has just been concluded today.
- Detailed discussions took place with the Schools forum High needs working group throughout the process – with headlines presented to forum.

Schools forum to further note that the benefits of the Lewisham mitigation plan as progressed with Schools forum is working well and beginning to show evidence of reduction in cost mainly arising from the revision of Lewisham based special needs provision (expansions and resource bases). Work is also continuing with external providers around fee negotiations.

10. Any Other Business

None.

Future Meetings

18 January 2024 (provisional date, subject to DfE)

All Schools Forum meetings continue to be held between 16:30-18:30 and remain virtual, unless advised otherwise.

Schools Forum Action Summary

Item	Action to be taken	Officer(s) responsible	Outcome/Current position
Matters Arising - Schools Forum 14 December 2023	Cost of living crisis - to lobby at National Level. Letter to be drafted for forum approval, making representation to the DfE/Secretary of State regarding the 2024/25 funding allocation error.	Chair	Position to be reviewed following year-end i.e. post March 2024.
Training for ALL Headteachers	Mandatory training	Mala Dadlani	Postponed till New Year.
6 - Dedicated Schools Grant 2024/25 – Schools Forum 14 December 2023	Notional SEN	Mala Dadlani	Working Groups requested a series of training sessions for schools to better understand notional SEN.
8 - Additional Funding for Schools in Deficit - Schools Forum 14 December 2023	Final outcomes report to forum for scrutiny with headlines.	Anthony Doudle	Engagement with schools in January – feedback to school at Forum meeting in Summer.
9 – High Needs Block– Schools Forum 14 December 2023	Grant Application - headlines of the final submission to be presented to forum in Jan.	Reinhild Onuoha	For January 2024 Forum.

Agenda Item 3

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Future Meetings

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Sub Group meetings

<u>High Needs Sub Group</u>

11 January 2024

Schools Forum Action Summary

Item	Action to be taken	Officer(s) responsible	Outcome/Current position
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<p>6 - Dedicated Schools Grant 2024/25 – Schools Forum 14 December 2023</p>	<p>Notional SEN</p>	<p>Mala Dadlani</p>	<p>Working Groups requested a series of training sessions for schools to better understand notional SEN.</p>
<p>8 - Additional Funding for Schools in Deficit - Schools Forum 14 December 2023</p>	<p>Final outcomes report to forum for scrutiny with headlines.</p>	<p>Anthony Doudle</p>	<p>Engagement with schools in January – feedback to school at Forum meeting in Summer.</p>
<p>9 – High Needs Block– Schools Forum 14 December 2023</p>	<p>Grant Application - headlines of the final submission to be presented to forum in Jan.</p>	<p>Reinhild Onuoha</p>	<p>For January 2024 Forum.</p>