

**Minutes of the Schools Forum – 26<sup>th</sup> May 2017**

**Walker Room, Meeting Point House, Telford Town Centre**

**Status: Agreed**

In attendance:

| <b>Name</b>                | <b>Establishment</b>               | <b>Representing</b>                  |
|----------------------------|------------------------------------|--------------------------------------|
| Sue Blackburn (SB) – Chair | Coalbrookdale & Ironbridge Primary | Maintained Primaries – South Cluster |
| Paul Broomhead (PB)        | Burton Borough Secondary           | Governors                            |
| Chay Davis (CD)            | Ercall Wood Secondary              | Maintained Secondary Schools         |
| Ros Garner (RG)            | Newport Girls' High                | Academies                            |
| Stephanie Gaskell (SG)     | St Lawrence Primary                | Maintained Primaries - North Cluster |
| Penny Hustwick (HW)        | ABC Nursery                        | PVI Representative                   |
| Helen Osterfield (HO)      | Tibberton Primary                  | Maintained Primaries - Small Schools |
| Jane Siddons (JS)          | Lightmoor Primary                  | Maintained Primaries                 |
| Tracey Smart (TS)          | Finance Manager                    | LA Observer                          |
| Tim Davis (TD)             | Finance Team Leader                | LA Observer                          |
| Sharon Carrington (SC)*    | Learning & Delivery Manager        | LA Observer                          |
| Andy Wood (AW)             | Senior Accountant - Schools        | LA Observer                          |

\* Part of meeting

**1. Apologies - AW.**

1.1 Apologies were received from the following:

Gilly Reynolds – Cabinet Member for Education, Employment & Regeneration

Jim Collins – Assistant Director, Education and Corporate Parenting

Claire Lamb – Redhill Primary – Maintained Primaries North Cluster

Becca Butler – Dothill Primary - Maintained Primaries Wellington Cluster

**2. Minutes of the Schools Forum held on 24<sup>th</sup> March 2017 and matters arising – SB.**

2.1 The minutes of 24<sup>th</sup> March 2017 were accepted as a true and accurate record of events. The minutes can be found at the Schools Forum section of T&W's website at the following link:

[http://www.telford.gov.uk/downloads/file/5490/march\\_2017\\_-\\_minutes](http://www.telford.gov.uk/downloads/file/5490/march_2017_-_minutes)

There were no matters arising that were not covered in the agenda for this meeting.

**3. Statutory duties for maintained schools previously funded by the Education Services Grant (ESG) - Initial information for FY1819 – TD.**

3.1 TD presented two papers which can be found at the following links:

[http://www.telford.gov.uk/downloads/file/5724/may\\_2017 - esg 2018-19 initial information](http://www.telford.gov.uk/downloads/file/5724/may_2017_-_esg_2018-19_initial_information)

[http://www.telford.gov.uk/downloads/file/5725/may\\_2017 - 1819 maintained school ex esg](http://www.telford.gov.uk/downloads/file/5725/may_2017_-_1819_maintained_school_ex_esg)

- 3.2 TD outlined the background to the LA's request for funding at the January meeting for FY1718.
- The DfE removed the ESG from April 2017 for statutory duties for all schools including academies and from September 2017 for statutory duties for maintained schools only;
  - LAs were expected to approach School Forums and request that funding be returned to the LA to fund statutory services for schools;
  - There were two votes: the first a whole Forum vote for duties relating to all schools including academies, and the second a vote by maintained school Forum representatives only, for de-delegation of funds relating to maintained schools only;
  - Following debate at the January 2017 Forum, the Forum agreed to fund a total of £510,000 for 'retained duties' (all schools including academies) and £350,000 for 'general funding' (maintained schools only).
- 3.3 In the second stage of their formula consultation the DfE have stated that for 2018/19 they intend to introduce a central services block of DSG. This would contain funding to support the retained duties element, which was the first vote at the January meeting. The papers presented therefore relate to the duties for maintained schools only.
- 3.4 The Forum was reminded that the proposals within the consultation are yet to be ratified by parliament and could change as a result of the election and a possible change in government.
- 3.5 TD asked the Forum if they felt that the second paper was a suitable way of presenting the information to them, to enable an informed decision to be made when the LA asks for funding later in the year. As some of the services have traded elements, the Forum was asked whether it would be beneficial to see details of the traded elements, alongside the statutory activities and costs of the service. Although no strong views were expressed, the general consensus was that this could be useful.
- 3.6 CD asked if academies were charged for any of the general duties services that are provided to them. TD stated that the EFA appeared to provide some elements of the services free to academies, but if the LA provided equivalent services to academies, they are charged.
- 3.7 TD stated that we now have an estimate for legal costs of around £12,000, based on their time recording system of work carried out.
- 3.8 TD pointed out that the amounts on the paper presented may change by the time of the Forum vote (in either November 2017 or January 2018) due to LA restructures, the possible conversion of some schools to academies, and general inflationary factors.

3.9 The amount approved for FY1718 of £350,000 was for seven months, so a full year equivalent would be in the region of £600,000. At present, the final amount requested for FY1819 is likely to be around £500,000, the lesser sum reflecting the LA's ongoing endeavour to reduce costs, as part of its response to Government reductions in funding.

#### **4. Update on apprentice levy – SC.**

4.1 SC introduced herself to the meeting and outlined her responsibilities in relation to the levy.

4.2 SC stated that the charge to the LA for the levy was in the region of £540,000. Approximately half of this relates to schools.

4.3 A pack will be sent out to schools shortly after half term. This will explain how the processes will work and identify the type of training programmes that are eligible. Key criteria are that there needs to be a genuine job for the trainee and the training period for any course can be up to four years long. SC will work with TS & TD on the finance implications of the scheme.

4.4 It was pointed out that small schools may need to collaborate to make use of the scheme.

4.5 JS commented that general funding was being taken from schools only to be returned to them ring-fenced for training.

4.6 HO asked if the levy money could be used to employ apprentices. SC replied that monies can only be used to fund training and assessment costs, not staffing costs.

4.7 PB asked if it could be used for CPD. SC stated that it could, but only for approved programmes.

4.8 CD asked what level of qualification the levy could be used for; can it be used for degree courses? SC stated that the course must be compliant with the ESFA listing of approved providers and courses.

4.9 TS reminded the group that contributing schools had up to two years to draw upon their contributions.

4.10 TD commented that whilst the initiative is entitled "apprentice levy", its remit is wider than the traditional idea of apprenticeships.

#### **5. End of year Dedicated Schools Grant (DSG) Balances - TD.**

5.1 TD presented a paper on the DSG balances held by both schools and the LA at 31<sup>st</sup> March 2017. The paper can be found at the following link:

[http://www.telford.gov.uk/downloads/file/5726/may\\_2017\\_-\\_end\\_of\\_year\\_dsg\\_balances](http://www.telford.gov.uk/downloads/file/5726/may_2017_-_end_of_year_dsg_balances)

- 5.2 The paper shows that school balances had been generally rising - albeit with a dip when a group of secondary schools converted to academy status in FY1314 - until the end of of FY1516. However in FY1617, the year recently ended, general revenue balances fell by around £2m, accompanied by a draw down of single status balances of around £300,000. Whilst only a single year, this is at least suggestive that after several years in which school funding has not kept pace with inflation, the impact of cost pressures is being felt on schools' bottom lines.
- 5.3 The DfE's school funding consultation documents imply that T&W schools would benefit from the new national funding formula. However it remains to be seen how closely a new government follows the consultation proposals.
- 5.4 In accordance with T&W's Scheme for Financing Schools, the Balance Control Mechanism (BCM) remains in place. In the context of the reduction in balances, for the June 2017 survey the LA is considering reviewing schools' use of balances to support FY1718 budgets, prior to asking schools to justify balances. This could significantly reduce the number of schools required to provide information.
- 5.5 LA centrally held balances have reduced significantly over the last two years. Due to high needs budget pressures, it seems likely that all remaining balances will be used in FY1718. TD mentioned that recent information released by the DfE had highlighted a 12% national increase in pupils with a statement/EHCP in January 2017 compared to January 2016, which in itself was 6.7% higher than the previous year. Local cost pressures form part of this national trend.

## **6 Any Other Business – SB.**

- 6.1 TD reminded the Forum that in the autumn term we would make allocations from the growth fund. From current information, it seems that a number of schools will be seeking funding but with a cash limited £100,000 available, only part of the equivalent AWPU funding above 5% growth may be able to be allocated.
- 6.2 The meeting closed at 10:10 am.

## **7 Future Meetings – AW.**

- 7.1 The next meeting of the Forum will be at Walker Room, Meeting Point House at 9:30 am on Friday 22<sup>nd</sup> September 2017.
- 7.2 The full list of forthcoming meetings can be found at the following link:

[http://www.telford.gov.uk/downloads/file/507/forum\\_meetings](http://www.telford.gov.uk/downloads/file/507/forum_meetings)