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To: The Chair and Members
of the Devon Education
Forum

County Hall
Topsham Road
Exeter
Devon
EX2 4QD

Date: 14 March 2023

Contact: Fiona Rutley 01392 382305

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DEVON EDUCATION FORUM

Wednesday, 22nd March, 2023

A meeting of the Devon Education Forum is to be held on the above date at 10.00 am at Committee Suite - County Hall to consider the following matters.

Donna Manson
Chief Executive

A G E N D A

PART I - OPEN COMMITTEE

1 Apologies for absence

2 Minutes (Pages 1 - 10)

Minutes of the meeting held on 18 January 2023, attached.

3 Items Requiring Urgent Attention

Items which in the opinion of the Chair should be considered at the meeting as matters of urgency.

4 Matters Arising from the Last Meeting and Report back on Issues Raised with Cabinet/f40

To consider any matters arising from the last meeting where not otherwise covered on this agenda and to report on items considered at the Cabinet.

5 Membership

6 Head of Education Update (Pages 11 - 18)

Report of the Interim Director of Children and Young People's Futures (DEF/23/07), attached.

SPECIFIC AGENDA ITEMS

7 Finance Update (Pages 19 - 28)

(a) Minutes of the Schools Finance Group (SFG), 8 March 2023, attached.
Also available at
[Schools Finance Group \(SFG\) – Education and Families \(devon.gov.uk\)](https://www.devon.gov.uk/schools-finance-group)

(b) Report of the Director of Children and Young People's Futures and Director of Finance and Public Value (DEF/23/05) attached.

8 2023/24 Advanced Notice of Planned Carry Forwards (Pages 29 - 30)

Report of the Director of Finance and Public Value and Interim Chief Officer of Children's Services (DEF/23/06), attached.

STANDARD AGENDA ITEMS

ITEMS FOR DEBATE AND INFORMATION

9 Standing (and other) Groups (Pages 31 - 36)

To review action and receive minutes for the Forum from its standing groups (excepting Schools Finance Group – see above) and to receive summary/minutes from other groups:-

(a) Standing Groups

(i) School Organisation, Capital and Admissions Forum

Minutes of the meeting held on 7 March 2023, attached.

Also available at

[School Organisation, Capital and Admissions Group \(SOCA\) – Education and Families \(devon.gov.uk\)](https://www.devon.gov.uk/education-and-families/soca)

(ii) High Needs Funding Sub Group

Chair to report on meeting held on 20 March 2023.

(b) Other Groups

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10 Correspondence

11 Dates of Future Meetings

Meetings at 10am. Please check venue/arrangements

<https://democracy.devon.gov.uk/mgCalendarMonthView.aspx?GL=1&bcr=1>

Wednesday 21 June 2023

Wednesday 22 November 2023

Wednesday 17 January 2024

Wednesday 20 March 2024.

Members are reminded that Part II Reports contain exempt information and should therefore be treated accordingly. They should not be disclosed or passed on to any other person(s). They need to be disposed of carefully and should be returned to the Democratic Services Officer at the conclusion of the meeting for disposal.

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Induction Loop available



DEVON EDUCATION FORUM

18 January 2023

Present:-

Schools Members

Primary Headteachers

Mr C Tribble

Mr G Chown

Mr P Walker

Ms R Miller

Honiton Primary

Ventrus MAT (Academy)

First Federation Trust (Academy)

Kingskerswell CE Primary, Substitute

Primary Governors

Mr J Clements

Ms K Brimacombe

Cranbrook, St Martin's CE Primary

Whitchurch Primary, First Fed'n (Academy)

Secondary Headteachers

Mrs S Crook

Ms F Bowler

Ms J Fossey

Ms Mr G Hill

Federation of Tiverton Schools

Braunton Academy

West Exe School, Ted Wragg MAT (Academy)

Academy Trust (Academy)

Secondary Governors

Mr A Hines

Ms G Sanders

Mr A Walmsley

(Education SW Trust) (Academy)

Athena Learning Trust (Academy)

The Ted Wragg Multi Academy Trust (Academy)

Nursery School

Mrs S Baker

Westexe

Special Headteacher

Mr K Bennett

Marland School

Special Governor

Mrs F Butler

Marland School (**Chair**)

Alternative Provision

Mr R Gasson

WAVE Multi Academy Trust

Non-Schools Members

Mr B Blythe

Mrs B Alderson

Ms G Rolstone

Exeter Diocesan Board of Education (Faith) Sub
PETROC

Teachers Consultative Committee (TCC)

Early Years, Private & Voluntary Independent

Observer

Councillor A Leadbetter

Cabinet Member – Children's Services and
Schools

Agenda Item 2

2

DEVON EDUCATION FORUM

18/01/23

Apologies

Ms R Saim

Cedar Tree Federation

72 **Minutes**

DECISION:

That the minutes of the meeting held on 23 November 2022 be signed as a correct record.

73 **Matters Arising from the Last Meeting and Report back on Issues Raised with Cabinet/f40**

DISCUSSION:

The Cabinet Member - Children's Services & Schools advised that Special Educational Needs and Disability (SEND) and the substantial High Needs Block deficit was a top priority for Cabinet and the County Council. He was always willing to be available to discuss such matters with the Forum and school leadership, as well as f40 issues, as a representative on f40's Executive.

The Cabinet Member also introduced Mr Julian Wooster, recently appointed Interim Director of Children and Young People's Futures (see also minute 74 below for further joint issues debated).

74 **Children and Young People's Futures Update**

DISCUSSION:

The Chair welcomed Mr Julian Wooster, Interim Director of Children and Young People's Futures who outlined his proposals for developing the service, working alongside the Cabinet Member (Children's Services & Schools).

The Interim Director indicated that the SEND improvement programme was the pressing priority, including controlling spend on independent special school placements. He welcomed working alongside the Interim SEND Strategic Director. Devon had to perform better, within a national system that was not working well and leading to a complex and very difficult environment to manage school and family expectations. This was to be seen as a whole Council issue, not a service issue.

A Forum Member's questions concerned senior leadership around SEND and communication with the Forum over the Cabinet and the County Council's position on SEND. Whilst recognising recent SEND progress, there was concern that as a number of key leadership posts were currently interim,

vision could further change when permanent appointments were made. The Forum and Phase Associations remained committed to working alongside the Council.

Regular senior leadership reports to Forum meetings were also requested.

75 **Membership**

DISCUSSION:

The Chair welcomed Ms Rachel Miller, substitute member (Kingskerswell CE Primary) to the meeting.

76 **Education & Learning Update**

DISCUSSION:

The Forum considered the Report of the Interim Director of Children and Young People's Futures, noting further developments since the publishing of the Report i.e.:-

(a) School Effectiveness Service

A revised Report recommendation in relation to school improvement (section 4 of the Report), proposed the use of Financial Intervention Panel, Schools (FIPS)' surplus funding for 2023/24 only. Some funding would also remain within FIPS in line with its prudent approach in supporting schools facing additional challenges; and

(b) Education Psychology Service (EPS)

The Interim SEND Director reported on the difficult decision to pause trading at least to the end of the summer term, with currently an 8 month wait for a pupil to receive an Education Psychologist assessment. The Department for Education (DfE) had acknowledged the difficult position (in Devon) and the need to address the backlog of cases.

There were plans to develop a sustainable service as part of the wider strategic plan, including:-

- recruitment process for four specialist senior staff working with schools;
- the SEND improvement plan was nearly ready for sign off;
- working together to ascertain what support schools needed;
- review of the funded structure and being creative with High Needs funding;
- Education Health & Care Plan (EHCP) good practice in-house/outside.

The Interim SEND Director would be sending a letter to schools and parents advising of the pause in the Education Psychology Service and offering apology for this.

Agenda Item 2

4

DEVON EDUCATION FORUM

18/01/23

The Report also considered school attendance and communications with schools.

DECISION:

(a) that surplus funding from within the Financial Intervention Panel, Schools (FIPS) budget for 2022/23 be carried forward and used for school improvement (school effectiveness service) for 2023/24 i.e. for one year only, at an estimated cost of £640,000, be approved;

(Vote: Maintained Primary)

(Vote: Maintained Secondary)

(b) that the draft letter to schools and parents regarding the pause in the Education Psychology Service be sent to the Chair of the High Needs Funding Sub-Group for comment prior to despatch.

ACTION:

Director of Finance and Public Value (Adrian Fox) – (a);
Interim SEND Director (Jackie Ross) – (b).

77

Finance Update

DISCUSSION:

(a) Schools Finance Group Minutes - 6 January 2023

The Forum considered the above minutes, including the respective minutes relating to the Finance Update Report at (b) and other DEF agenda items where appropriate.

Also available at

[Schools Finance Group \(SFG\) – Education and Families \(devon.gov.uk\)](https://www.devon.gov.uk/schools-finance-group-sfg-education-and-families)

DECISION:

that the minutes of the Schools Finance Group (SFG), 6 January 2023 be received.

(b) Finance Update Report

The Forum considered the Report of the Interim Director of Children & Young People's Futures and Director of Finance and Public Value (DEF/23/02).

Month 8 outturn forecast 2022/23 saw an overall DSG overspend spend of £40.6m due to the continued demand on High Needs and the growing demand on SEN placements within the Independent Sector despite creating

more Devon special school places. This was an adverse change of £458,000 since month 7.

Dedicated Schools Grant (DSG) management action was anticipated to deliver £6.3m savings in this financial year (£3.9m to date).

The Report highlighted reasons for a projected cumulative DSG deficit to March 2023 of £127.2m, increasing to £144m by 2024/25, i.e. £4.9m over that included in the DfE Safety Valve. Solutions to mitigate the in-year overspend were being reviewed.

The increasing DSG deficit could have considerable impact on future DSG education budgets as well as Devon County Council. Action was required now by all stakeholders, working in partnership to reduce the demand on EHCPs and independent placements.

Member's discussion included:-

-concern that with the projected cumulative DSG deficit to March 2023 of £127.2m increasing to £144m by 2024/25, the management actions resulting in savings may not be sufficient to rectify the deficit position (whilst noting some savings were longer term); and

--whether the DfE had yet confirmed that Devon had been accepted onto the DSG Safety Valve Programme, recognising the serious risks should this not be the outcome.

In response:-

-the Interim SEND Strategic Director advised of a number of projects (including Team Around the School) and the work of a senior group with experience and expertise, which was for example preventing independent special school placements (wherever Devon provision was appropriate); and

-the Director of Finance and Public Value advised that a DfE response on the Safety Valve position was still awaited, although there had been a further formal senior leadership approach to the DfE in December 2022. A further follow up would now be made.

DECISION:

(a) that month 8 DSG monitoring position be noted along with the Forum's ongoing concerns at the DSG deficit, recognising there was much work required to reach a sustainable solution; and

(b) that the current Safety Valve/DSG manage plan position and further formal senior leadership approach to the DfE be noted.

Agenda Item 2

6

DEVON EDUCATION FORUM

18/01/23

ACTION:

Director of Finance and Public Value (Adrian Fox) – (b)

78

Dedicated Schools Grant 2023-24: Budget Planning

DISCUSSION:

The Forum considered the Report of the Director of Finance & Public Value and Interim Director of Children and Young People's Futures (DEF/23/03) regarding the:-

DSG Settlement 2023-24
Schools Block
Central School Services Block
High Needs Block
Early Years Block
Other Schools Grants
DSG Deficit & Management Plan.

In relation to the Schools Block, the government funding settlement was £2m below a fully funded National Funding Formula, therefore to ensure the block remained within its funding requirements actions were required as set out in section 2 of the Report.

DISCISON:

(a) that the reduction of the size of the growth fund from £2.8 million for 2023-24 to £1.8 million be approved, in line with the 2023-24 spending forecast.

(Vote: Schools, Academies and PVI)

(b) that the use of the balance from the reduction of size the growth fund for 2023-24 against the shortfall of £970,000 in Schools Funding that remained after reducing the Sparsity Factor to £47,300 for Primary and £72,900 for Secondary be approved.

(Vote: Schools, Academies and PVI)

ACTION:

Director of Finance & Public Value (Adrian Fox)

79 2023-24 Schools Funding Arrangements - Transfer to the High Needs Block

DISCUSSION:

The Forum considered the Report of the Director of Finance & Public Value and Interim Director of Children and Young People's Futures (DEF/23/04) regarding the reconsideration of the transfer 0.5% between blocks for 2023-24 through a one-off transfer of the growth fund surplus, to support the demands of the High Needs Block and in particular the work on cost prevention and reduction, as set out in the Report.

This followed the Forum's refusal of this transfer at its last meeting and subsequent disapplication by the County Council to the Secretary of State for Education to overrule this decision. The DfE subsequently had requested the forum to reconsider their decision following the announcement of the Mainstream Schools Additional Grant (MSAG) funding for schools (indicative Devon allocation of an additional £17m (3.4%)), which placed schools in a much better financial position than at the time of Devon's school funding consultations in October 2022. The DfE did not expect the Forum to rely upon the outcomes of that consultation.

A Forum representative commented that although this proposal had been discussed at the Schools Finance Group on 6 January 2023, there had been further developments, he also expressed concern at the DfE's comments in relation to consideration of the October 2022 Devon consultation response. However there was now an opportunity to demonstrate and evidence the impact on schools of the proposal for the one-off Growth Fund surplus transfer for 2023-24 only, without individual school budgets being impacted. This should then form an early basis for the next year's consultation round when money would be required from individual school budgets.

DISCISON:

that Cabinet be recommended:-

that the transfer of 0.5% between blocks for 2023-24 through a one-off transfer of the growth fund surplus be supported (following its reconsideration as requested by the DfE).

(Vote: Schools, Academies and PVI)

ACTION:

Director of Finance & Public Value (Adrian Fox)

Agenda Item 2

8

DEVON EDUCATION FORUM

18/01/23

80 Standing (and other) Groups

DISCUSSION:

The Forum received the following from its standing and other groups (excepting Schools' Finance Group (SFG) minutes, (considered under Finance Update minute above):-

(a) School Organisation, Capital and Admissions (SOCA)

Minutes of the meeting held on 6 December 2022.

Also available at

[School Organisation, Capital and Admissions Group \(SOCA\) – Education and Families \(devon.gov.uk\)](#)

(b) High Needs Funding Sub Group

The Chair's verbal update of the meeting held on 16 January 2022 was noted. In summary the group had considered communications to schools and key messages of keeping more children in mainstream school. The ambition for a mindset change was important to slow the level of EHCPs and SEN placements.

The next work area for the group was to look at the funding framework in the round assisted by a task & finish group, reporting back to the Forum in due course.

81 Review of standard agenda items

Members identified standard matters they would like to be included within future Forum agendas (predominantly to be included with the Head of Education Update standard agenda item):-

Education/School Key Performance Indicators

Education/School Performance Data

Key Priorities

SEND outcomes

Ofsted outcomes reported on a termly basis (including % schools according to Ofsted rating and any shift in patterns)

Reports from Devon regarding SEND (including risks) and schools' feedback reports.

82 Correspondence

-

83 Dates of Future Meetings

Meetings at 10am. Please check venue/arrangements

<https://democracy.devon.gov.uk/mgCalendarMonthView.aspx?GL=1&bcr=1>

Wednesday 22 March 2023

Wednesday 21 June 2023

Wednesday 22 November 2023

Wednesday 17 January 2024

Wednesday 20 March 2024.

NOTES:

1. *Minutes should always be read in association with any Reports for a complete record.*
2. *If the meeting has been webcast, it will be available to view on the [webcasting site](#) for up to 12 months from the date of the meeting*

* **DENOTES DELEGATED MATTER WITH POWER TO ACT**

The Meeting started at 10.10 am and finished at 11.52 am

Agenda Item 2

HEAD OF EDUCATION UPDATE

REPORT OF THE INTERIM DIRECTOR OF CHILDREN AND YOUNG PEOPLE'S FUTURES

Recommendation: Report be noted.



1. Key Performance Indicators comparing current performance to the same time last year.

Attendance

	2021/22 – Autumn/Spring Terms Combined*	2022/23 – Autumn/Spring (Data until 09/03/2023)**
Total	91.4% Attendance	92.3% Attendance
	7.1% Authorised Absence	5.9% Authorised Absence
	1.5% Unauthorised Absence	1.8% Unauthorised Absence
	26.8% Persistent Absence	22.0% Persistent Absence
Primary	93.2% Attendance	94.1% Attendance
	6.0% Authorised Absence	5.0% Authorised Absence
	0.8% Unauthorised Absence	0.9% Unauthorised Absence
	20.2% Persistent Absence	17.0% Persistent Absence
Secondary/All-Through	89.6% Attendance	89.7% Attendance
	8.3% Authorised Absence	7.2% Authorised Absence
	2.3% Unauthorised Absence	3.1% Unauthorised Absence
	34.7% Persistent Absence	29.0% Persistent Absence
SEN (E+ K Combined)	87.1% Attendance	88.2% Attendance
	10.4% Authorised Absence	8.4% Authorised Absence
	2.5% Unauthorised Absence	3.5% Unauthorised Absence
	40.8% Persistent Absence	34.0% Persistent Absence
SEN Support (K)	DfE Data Not Available	88.7% Attendance
		8.0% Authorised Absence
		3.2% Unauthorised Absence
		33.0% Persistent Absence
SEN (E)	DfE Data Not Available	85.6% Attendance
		10.5% Authorised Absence
		3.9% Unauthorised Absence
		37.0% Persistent Absence
FSM	87.5% Attendance	87.3% Attendance
	9.1% Authorised Absence	8.5% Authorised Absence
	3.4% Unauthorised Absence	4.2% Unauthorised Absence
	43.8% Persistent Absence	41.0% Persistent Absence
Male	91.3% Attendance	92.4% Attendance

Agenda Item 6

DEF/23/07

Devon Education Forum

22 March 2023

	6.9% Authorised Absence	5.8% Authorised Absence
	1.4% Unauthorised Absence	1.7% Unauthorised Absence
	26.0% Persistent Absence	21.0% Persistent Absence
Female	91.3% Attendance	92.2% Attendance
	7.2% Authorised Absence	6.0% Authorised Absence
	1.5% Unauthorised Absence	1.8% Unauthorised Absence
	27.6% Persistent Absence	22.0% Persistent Absence

* Data Source - DfE (<https://explore-education-statistics.service.gov.uk/data-tables>)

** Data Source (Devon County Council Local Data supplied from Devon Schools)

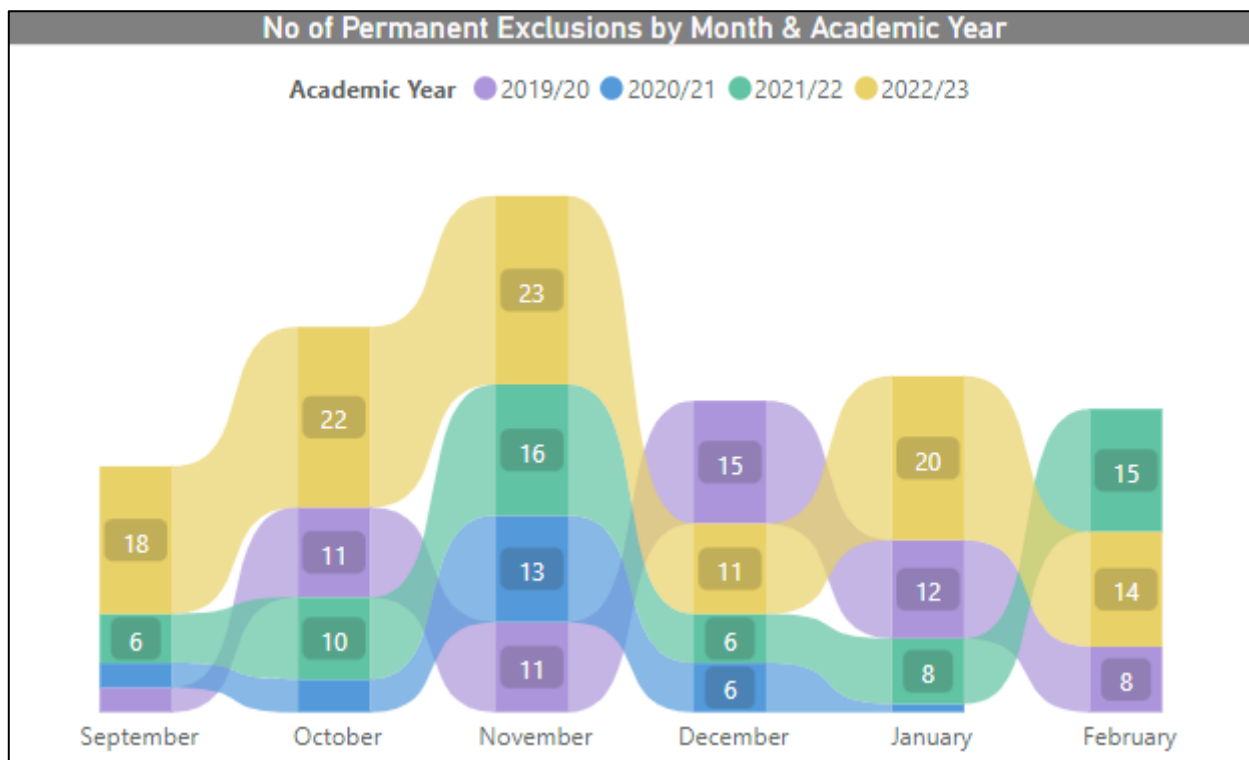
Exclusions

Permanent Exclusions*

	2021/22 – Autumn/Spring Terms Combined**	2022/23 – Autumn/Spring (Data until 09/03/2023)**	Difference
Total	95	125	+30
Primary	18	13	-5
Secondary	77	112	+35
SEN (E+ K Combined)	72	100	+28
SEN Support (K)	64	83	+19
SEN (E)	8	17	+9
Male	63	86	+23
Female	32	39	+7

* Includes Reinstated and Withdrawn Permanent Exclusions

** Data Source (Devon County Council Local Data supplied from Devon Schools)

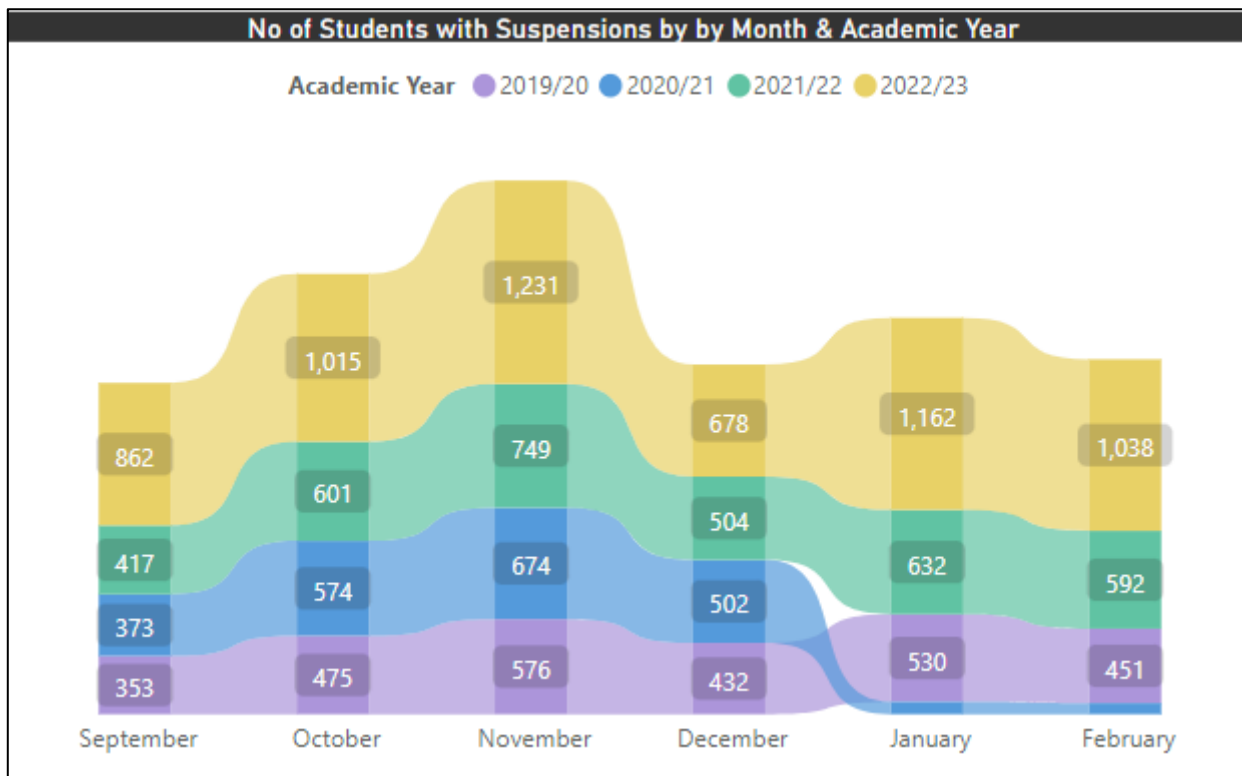


Exclusions

Suspensions

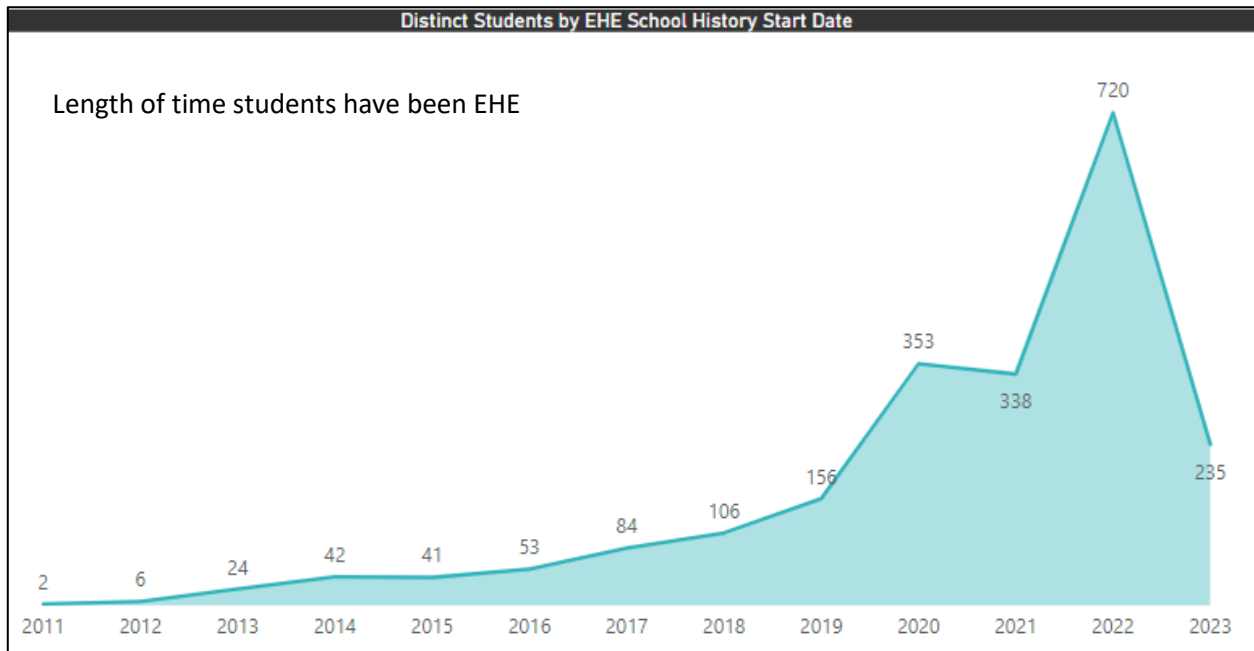
	2021/22 – Autumn/Spring Terms Combined*	2022/23 – Autumn/Spring (Data until 09/03/2023)*	Difference
Total	2496	3060	+564
Primary	320	320	=
Secondary	2176	2740	+564
SEN (E+ K Combined)	1266	1658	+392
SEN Support (K)	911	1258	+347
SEN (E)	355	400	+45
Male	1612	1958	+346
Female	884	1102	+218

* Data Source (Devon County Council Local Data supplied from Devon Schools)



Elective Home Education (EHE)

	Numbers as 10 th March 2022	Numbers as 10 th March 2023	Difference
Total	1752	2001	+249
Primary	725	695	-30
Secondary	1027	1306	+279
SEN (E+ K Combined)	614	706	+92
SEN Support (K)	476	539	+63
SEN (E)	138	167	+29
Male	847	959	+112
Female	905	1042	+137



Children Missing Education (CME)

	Numbers as 10 th March 2022	Numbers as 10 th March 2023	Difference
Total	61	90	+29
Primary	21	20	-1
Secondary	40	70	+30
SEN (E+ K Combined)	30	49	+19
SEN Support (K)	15	22	+7
SEN (E)	15	27	+12
Male	34	50	+16
Female	27	40	+13

2. Performance indicators for 2021-2022 comparing us to national and ranking us against all other LAs.

	Devon	National	Rank to other LAs
Absence rate			
All	8.2	7.5	82 nd
Disadvantaged	12.1	10.5	90 th
SEND	11.4	10.4	82 nd
Persistent Absence			
All	24.1	22.5	71 st
Disadvantaged	41	35.1	91 st
SEND	35	32.8	75 th
Severely Absent (<50%)			

Agenda Item 6

DEF/23/07

Devon Education Forum

22 March 2023

All	2.1	1.6	75 th
Disadvantaged	4.3	2.8	92 nd
SEND	4.7	3.4	87 th
Suspensions			
All	9.25	5.97	85 th
Disadvantaged	26.12	14.47	91 st
SEND	26.3	14.22	92 nd
Permanent Exclusions			
All	0.11	0.06	64 th
Disadvantaged	0.36	0.17	83 rd
SEND	0.26	0.11	80 th
Pupil Outcomes			
EYFS	65.8	65.2	45 th
Phonics	76.1	75.5	50 th
KS1 Read	67	66.8	52 nd
KS1 Write	56.8	57.6	61 st
KS1 Maths	66.2	67.6	69 th
KS2 Read	74.8	74.5	50 th
KS2 Write	67	69.5	69 th
KS2 Maths	69.3	71.4	68 th
KS2 RWM	55.4	58.7	73 rd
KS4 Progress 8	-0.13	-0.03	64 th
KS4 Attainment 8	48.2	48.7	57 th
EBACC Entered	33.8	38.7	67 th
English & Maths 5+	48.9	49.6	50 th
English 5+	63.9	65.2	61 st
Maths 5+	55.1	54.6	41 st

As we have previously mentioned, there are significant concerns about the number of children outside of our education system within Devon. This data shows that in areas such as attendance and suspensions, in 2021-2022, we are performing very poorly compared with other Local Authorities, particularly with our disadvantaged students.

3. Making Attendance Everyone's Business

- 3.1. We have met with the DFE advisor and produced a self-evaluation of our progress towards meeting the new requirements. We are currently trying to ensure that discussions/ questions about a pupil's attendance are part of all plans used across Children's services – this includes SEND, Social Care, Health etc to ensure agencies are working together to improve this where there are concerns.
- 3.2. The Early Year's team believe they play a very strong role in promoting positive attitudes towards attendance from the first contact with a family. They are going to be working closely with their settings to help them establish this culture.
- 3.3. Currently work is taking place with the Education Welfare and Inclusion team to ensure staff are prepared for the way in which we work with schools will change. We will also need to prepare schools for this over the Summer Term. Moving ahead, the LA will need to have a termly conversation with the school to identify, discuss and signpost or provide access to services for pupils who are persistently or severely absent or at risk of becoming so. This means the role of the EWO will be changing as they will be working more strategically with the school and working in partnership with schools to ensure actions are being taking and

positive relationships developed, to improve attendance. Any casework required will need to be commissioned or provided by the school.

4. Children and Young Peoples Mental Health

- 4.1. We recently met for a second time with young people to discuss how children’s mental health is supported. This brought together leaders in health, social care and education and the young people were asking us to consider what actions we can take to improve services for them. One concern that came from this was discovering that Devon has the lowest number of schools who have signed up for the Senior Mental Health Lead grant funded training from the DFE (<https://www.gov.uk/guidance/senior-mental-health-lead-training>). Applications for this grant end on 31st March so we are writing to all schools to urge them to take up this training before the opportunity expires.
- 4.2. We have made a commitment to young people that we will organise a meeting with school leaders during the Summer Term to discuss what schools can do to support young people with their mental health.

5. Ofsted Complaints

- 5.1. We have seen a significant increase in Ofsted complaints in recent weeks and currently have 34 open investigations. Many concern the wellbeing of pupils and SEND needs not being met, several raise concerns about safeguarding. In a large majority of cases, the complainant has not been through the school’s complaints process and we are asking schools to ensure their complaints process is easy to find on their website.
- 5.2. Approximately 6-10 schools are being inspected each week in Devon at the moment. There is a delay until the final outcome is known so the data below covers inspections from 01.09.22 until the present date, where the report has been published.

Secondary School		Primary School	
Outstanding	1	Outstanding	1
Good	3	Good	35
Requires Improvement	2	Requires Improvement	4

Schools inspected from 01.09.22	Outstanding	Good	Requires Improvement	Inadequate
Devon	4.3%	83%	13%	0%
All LAs	4.72%	82.4%	11.58%	1.66%

6. Shaping Children’s Services to Schools

- 6.1. On Wednesday 15th March we will be having our first meeting with Essex County Council. They are going to work in partnership with Devon to explore how we can best organise and locate services for schools across the County. We are keen to continue exploring if a locality based model could work, incorporating aspects of health and social care. As part of this work, we will also be ensuring that there are clear definitions of the role of the Local Authority and their accountability to all children across Devon. This will help to define what the relationship of the Local Authority should be with settings in providing challenge, support and accountability. We will provide more details of this project work as it progresses through the DEF.

Agenda Item 6

DEF/23/07

Devon Education Forum

22 March 2023

Julian Wooster

Chief Officer for Children Services (Interim)

March 2023

Please ask for Rachel Shaw (Rachel.Shaw@devon.gov.uk)

Schools Finance Group: Notes of meeting on Wednesday 8 March 2023

Items for DEF to note:

- **Item 5 – Homes for Ukraine funding**
- DEF to note projected year end balance of £1.3m in government H4U funds held by DCC. Further communications to be issued to ensure awareness of funding available to schools with Ukrainian pupils on roll.
- **Item 6 – Growth Fund**
- DEF to note projected year end deficit balance due to a range of factors and a planned review of one-off additional funding for exceptional growth in schools.
- **Item 7 – Early Years funding**
- DEF to note proposed use of carry forward funding to boost support for children with speech, language, communication, and social, emotional and mental health (SEMH) needs.
- Colleagues to look into provision of support funding for Early Years settings with Ukrainian children on roll.
- **Item 8 - Review of SFG and DEF dates in January**
- **SFG Recommendation to DEF** to move January SFG and DEF meeting dates back by one week (from 17th to 24th Jan 2024 - which will still meet Cabinet and DfE deadlines) to allow additional time to consider implications of funding statement normally issued by DfE just before Christmas break.

ATTENDANCE

DCC

Mat Thorpe- **Apologies**
Adrian Fox
Rachel Shaw
Heidi Watson-Jones

Deputy Director of Finance and Public Value
Head Accountant (Education & Learning)
Interim Head of Education (Delivery)
Safety Valve Project Officer

Devon Schools Leadership Services

Primary:

Jamie Stone- **Apologies**
Paul Walker - **Apologies**
Penny Hammett - **Apologies**
Christopher Tribble

Denbury Primary
First Federation Trust
FORT Federation
Honiton Primary

Secondary:

Sammy Crook
Alan Blackburn
Fay Bowler - **Apologies**
Rob Gammon

Tiverton Federation
Uffculme School
Braunton Academy
QE

Alternative Provision:

Rob Gasson

Wave Multi Academy Trust

Special Schools

Keith Bennett - **Apologies**
Sarah Pickering - **Apologies**

Marland School
Mill Water School

DAG

Faith Butler- **Apologies**
Alex Walmsley
Adrian Hines

Special School Governors
Secondary Governors
Primary Governors

Early Years Providers

Gemma Rolstone

Puffins Childcare

Agenda Item 7

Schools Finance Group:

Notes of meeting on Wednesday 8 March 2023

Other DCC Officers

Karlien Bond

Katrina Harverson

Simon Niles

Senior Accountant (Schools)

Principal Accountant – Education & Learning

Schools Planning, Pupil Placement &

Commissioning manager

SCHOOLS FINANCE GROUP

1. Minutes of Previous Meeting – 6 January 2023

- MT / JR to liaise re. negotiation of top up for special schools for exceeded places – **AF** to follow up
- Communication due to go out to schools highlighting sparsity coming into base funding
- Ongoing actions for high needs funding sub group re. communications and identifying trends in high needs savings
- All other actions complete or in hand.
- Minutes agreed as an accurate record.

2. DSG Monitoring – month 10

- DSG deficit projected to rise to £127m by end of financial year
- £4.2m savings have been achieved, however £4.6m now deemed unachievable, due to a range of factors within the SEND Projects
- Confirmation still awaited from DfE re. inclusion in Safety Valve Intervention Programme.
- SEND strategy day was held with new CEO, Donna Manson who has now established a Gold Command structure to address SEND improvement and the HNB deficit, in a similar structure to emergency response management.
- Deficit projected to increase to £153m without financial support, which would deplete DCC reserves.
- SFG noted summary of high needs block position
- Report noted

3. Carry Forwards 2022-23

- Growth Fund surplus noted – part of which will be used to transfer to the High Needs Block as per previous discussions at SFG and DEF.
- Position noted

4. Mutual Fund Update

- Noted current volatility of claims
- Predicting a small surplus to still be in place at year end

5. Homes for Ukraine funding

- Agreed strategy for managing government funding has been put in place.
- £3.5m total funding has been received with funding going to schools and DCC support services (EMTAS, and Admissions team).
- English speaking Ukrainian teacher engagement has been well received
- Noted some expenditure on personalised home to school transport.
- £1.8m currently unallocated – projected to be £1.3m into new financial year.
- Concerned that not all schools are claiming the funding available to them, and some pupils are not being identified.

Schools Finance Group:

Notes of meeting on Wednesday 8 March 2023

- Noted government H4U scheme has been extended, but no confirmation that any further funding will be made available to local authorities.
- Clarity being sought on support funding available for the FE sector or whether they would be eligible to receive some of this funding.
- SFG noted the prudent approach to funding allocation given the ongoing conflict and lack of clarity for funding post 2022-23.
- SFG felt that it will be important to continue to raise awareness that funding is available to schools still receiving Ukrainian pupils. Schools are being welcoming and demonstrating resilience well.
- Noted that some additional SEN needs are now emerging as children become more settled and included.
- Additional SEN needs and associated costs will need to be monitored and possibly additional contingency considered if needed.
- SFG would be supportive of continuing half-termly allocations to schools should further funding become available.
- Further monitoring and update to be discussed at next SFG in June.

ACTION:

- **RS/SN** to issue further information through School Leadership Update to further raise awareness of funding and support available.
- **SN** to provide further monitoring update report to next SFG

6. Growth Fund

- An Growth Fund underspend had been projected at the time of SFG and DEF discussions around use of Growth Fund to support HNB.
- National Non Domestic Rates for maintained schools, a reduction in APT funding, shortfall after reduction in the sparsity factor, and further in-year growth have also impacted negatively on Growth Fund, resulting in a deficit balance of £808k at year end.
- Understand funding will be made available for Afghan bridging hotel costs, which will change bottom line.
- 2022-23 Admissions round has been challenging – with some reluctance emerging for schools admitting additional pupils, and feeling that growth funding associated with a 'bulge year' would be inadequate. SFG agreed that Simon Niles conduct a review of one-off additional funding.
- Allocation of slippage against the overspend has been proposed.
- Finance colleagues confirmed that there would be no proposals to recoup funding from Schools Block.

ACTION:

- **SN** to review Growth Funding one-off allocations to schools experiencing a 'bulge year' of admissions.

7. Early Years Funding

- SFG noted proposal that funding rates for Early Years providers be increased
- Funding increases notified by DfE before Christmas and DCC were able to implement some increases from Spring Term rather than waiting until April 2023, which was well received by providers.
- Noted cessation of grant funding for Teachers pay grant and Teachers Pension employer contribution grant from April 2023.
- Noted carry forward proposal of £100k be used to boost support for speech, language and communication, and SEMH.
- Understand that settings are managing any incoming Ukrainian refugee children well, however the service continues to consider extending the offer for these children.

Agenda Item 7

Schools Finance Group:

Notes of meeting on Wednesday 8 March 2023

- GR felt that providers would welcome additional funding for support for Ukrainian children, and additional inclusion funding would be gratefully received.
- Noted challenging environment for Early Years provider settings, and government funding increases do not meet the required level of support including and increases in minimum wage, and business rates for providers, and covering grant funding around pay and pensions. Ongoing lobbying in place to raise the issues with MPs.
- Report noted

ACTION:

Marie Stone to liaise with Simon Niles re. accessing funding to increase childcare offer for Ukrainian children

8. AOB

3.4% uplift for AP budgets for 2023-24

- to be discussed at High Needs Funding Sub Group

Timetabling for year end – all information on the finance blog

- **27/3** for submitting March claims for Mutual Fund
- **24/3** for submitting year end accruals information – giving a week for finance to process prior to end of term.

Review of SFG and DEF dates in January

- Lateness of information from DfE prior to Christmas makes situation difficult to process
- **SFG agreed** recommendation to move meeting dates back by one week which will still meet Cabinet and DfE deadlines

9. Items for DEF

- Standard Monitoring items
- Growth Fund
- Carry Forwards

Future meeting dates:

- **Wednesday 7 June 2023** (09.15 – 12.30 – Teams)
- **Monday 10 July 2023** (12.30 – 15.45 – Teams)
- **Wednesday 13 September** (09.15 – 15.30 – face to face – Venue tbc)
- **Monday 6 November 2023** (14.00 – 17.30) – Teams
- **Friday 5 January 2024** (09.15 – 12.30 – Teams) – **proposed move to Friday 12th Jan**
- **Wednesday 6 March 2024** (09.15 – 12.30 – Teams)

22 March 2023

Finance Update

Report of the Director of Finance and Public Value and Interim Chief Officer of Children's Services

Recommendations

It is recommended that Schools Forum:

- a) Note month 10 DSG monitoring position as set out in this report sections 1 to 4
All to note

Budget Monitoring Report - Month 10 (2022/23) – Dedicated Schools Grant

Executive Summary

- The month 10 outturn forecast for 2022/23 sees an overspend in the overall Dedicated Schools Grant (DSG) of £41.1 million which is associated with the continued demand on High Needs and the growing demand on Special Educational Needs (SEN) placements within the Independent Sector despite creating more places within Devon's Special Schools. This is an adverse change of £204,000 since month 9 (£564,000 from month 8).
- The Management Action of £10 million reflects the revised savings expected to be delivered in 2022/23 and are as per the Safety Valve submission to the DfE. To date, £4.2 million of Management Actions have been achieved since the start of the summer term.
- £4.6 million of savings is currently identified not to be achieved in this financial year due to 58 of the 77 planned 3-5 year placements within the Independent Sector leaving at the end of the summer term, delay in resource base provision placements being occupied / opened, delay in the commencement of the Post 16 and reduction in the expected number of children being supported through the SEN100 Special Schools project. This is projecting a cumulative DSG deficit to March 2023 of £127.7 million which is £5.4 million over what has been included in the Safety Valve
- A SEND Day was held by Senior Leadership Team of the Authority on the 9th February to create a shared understanding and clarity on the strategic response to the current challenges in SEND and to share the understanding of the priorities for the next steps. A gold command team will be set up with initially weekly reporting.
- The increasing DSG deficit could have a considerable impact on future education budgets within the DSG as well as impacting on the financial sustainability for Devon County Council. An urgent action is still required to reduce the demand on Education Health Care Plans (EHCPs) and independent placements. We need all stakeholders to be working in partnership to be able to achieve this.

1. Schools

1.1. In March the revised DSG settlement allocation stands at £307.6 million (after recoupment for academies and direct funded places) based upon pupil numbers as at the October 2021 Schools census and January 2022 Early Years census.

Table 1: Summary of Month 10 forecast position and significant variations

Budget projections as at Month 10	Revised Budget for year £'000	Underlying outturn forecast £'000	Management Action pending		Net Outturn forecast £'000	Forecast outturn variance £'000	Analysis of outturn variance		Change from month 8		
			FSP savings o/s £'000	Non FSP action o/s £'000			Total forecast FSP savings £'000	Underlying forecast outturn variance £'000	Total Forecast FSP savings £'000	Forecast outturn variance £'000	
Schools delegated budgets	221,794	221,794			221,794	0	0	0	0	0	0
Academy Grants	4,056	4,056			4,056	0	0	0	0	0	0
DSG and School Funding	(344,687)	(344,687)			(344,687)	0	0	0	0	0	0
Total DSG Funding	(118,837)	(118,837)	0	0	(118,837)	0	0	0	0	0	0
De-delegated budgets	6,086	6,084	0	0	6,084	(2)	0	(2)	0	(2)	
Central School Services Block	4,183	4,184	0	0	4,184	1	0	1	0	0	
Early Years & Childcare Services	41,647	41,647	0	0	41,647	0	0	0	0	59	
Total DSG central budgets	51,916	51,915	0	0	51,915	(1)	0	(1)	0	57	
High Needs Budget	128,941	139,048	0	(1,188)	137,860	8,919	0	8,919	0	507	
DSG High Needs 22/23 deficit budget prep	(32,225)	0	0	0	0	32,225	0	32,225	0	0	
Total High Needs budget	96,716	139,048	0	(1,188)	137,860	41,144	0	41,144	0	507	
Total Dedicated Schools Grant	29,795	72,126	0	(1,188)	70,938	41,143	0	41,143	0	564	
Total								41,143			

Page 24

1.2. The working budget is inclusive of other schools grants of £41.4 million.

1.3. Reporting a slight overspend, this budget heading includes Termination of Employment Costs, Admissions, Schools Forum, Devon SLS (Phase associations), Insurances and Surplus Properties.

2. DSG Deficit Management Plan

Table 2: DSG Adjustment Account

	£'000
DSG Adjustment Account	86,529
DSG High Needs 22/23 deficit	41,144
Total DSG Deficit Reserve	127,673

- 2.1. The DSG Adjustment Account, which shows the cumulative DSG Deficit as per government guidance, is projected to rise to £127.7 million by the end of 2022/23. This is due to the funding pressure identified of £41.1 million and after management actions of £5.4 million.
- 2.2. The management plan has been developed in conjunction with the DfE as part of the Safety Valve Intervention Programme. The DfE template is intended to capture the impact of this plan and to start to reduce the DSG deficit reserve.
- 2.3. Work is required to update the management plan to reflect the current in year pressures and revisit workstreams which are not performing as originally planned, this all needs to be completed in conjunction with Senior Leadership Team (SLT) Gold Command response to SEND.

3. High Needs

Table 3: Summary of High Needs budgets and forecast position as at Month 10

	Budget £'000	Mth 10 Forecast £'000	Variance £'000	Movement Previous Mth £'000
Alternative Provision	3,644	4,232	588	(92)
Children in Care and Exclusions	1,812	1,812	0	0
Improved Outcomes Disadvantaged Children	1,614	1,498	(116)	5
Inclusion	211	211	0	0
Nursery Plus	1,164	1,200	36	0
Safeguarding Every Learner	203	212	9	(1)
SEN Mainstream	22,688	24,577	1,889	(56)
FE Colleges	3,410	3,538	128	(52)
SEN Services	933	911	(22)	1
SEN 100 Project	969	969	0	0
Maintained & Academy Special Schools	39,724	40,406	682	497
Hospital Education Services	827	827	0	0
Recoupment	1,877	1,613	(264)	(374)
Other Special School Fees	47,628	54,102	6,474	260
Support Centre Funding	2,237	1,751	(486)	(2)
Total High Needs Funding	128,941	137,859	8,918	186
DSG High Needs 22/23 deficit budget prep	(32,225)	0	32,225	0
Total High Needs budget	96,716	137,859	41,143	186

- 3.1. Cost and volume variances are shown in Appendix A

Maintained and Academy Special Schools

- 3.2. The average numbers on roll including Plus Packages and Exceeded places are forecast at 1,645 (vs 1,637 budgeted). Plus Packages and Exceeded places are 28 above budget resulting in an

overspend of £359,000, however this has been offset by a reduction in top up of 20 places and a saving of £253,000.

- 3.3. Place funding has been reduced by 14 due to capacity limitations at Southbrook and ACE Tiverton resulting in savings of £157,000. A review of residential funding has resulted in a reduction at Orchard Manor, whilst there is a rise at Marland residential school for additional staffing, seeing a net saving of £190,000.
- 3.4. Forecast assumes an increase in joint funding income of £15,000 and £565,000 of Management Action will be achieved in this financial year. £816,000 of the SEN 100 Special Schools project will not be realised due to the reduced number of pupils being supported.
- 3.5. Since month 9 there has been a further overspend of £497,000 due to a reduction in Management Action savings of £483,000 and a delay to ceasing the exceeded place and top up funding of £106,000 savings to April 2023, this is offset in part by other savings in top up funding.

Recoupment

- 3.6. There has been a reduction in costs of £374,000 since month 9 due to the net movement in Other Local Authority recoupment and correction to Other Special Schools Fees for Somerset Independent exports.

Other Special Schools Fees

- 3.7. The Other Special Schools budget includes Safety Valve Management Action of £8.1 million of which £4.1 million is forecast to be achieved in this financial year (£3.8 million achieved to date). £4 million will not be achieved in this financial year and relates to;
 - £1.4 million current hold on additional resource bases which were due to open in Sept.
 - £259,000 Post 16 cessation of 3–5-year placements in the summer term, management action assumed 73 placements would end in July 2022 of which 58 have been identified.
 - £1.6 million Transition to Adulthood savings will not be realised in this financial year.
 - £647,000 Outreach Support – Special Schools, reduction in the number of children being supported
 - £248,000 Special School capacity – Lampard additional 32 places not available from January 2023
- 3.8. The overspend of £260,000 since last reporting comprises the removal of £628,000 Management Actions for Special School Capacity and Outreach Support not supporting as many as planned. This has been offset in part by a net reduction of 4 placements totalling £248,000 and additional £119,000 actions for additional cessation of 3-5 year placements and Outreach Support Babcock
- 3.9. A commissioning group is currently being set up with officers across the authority who have expertise in commissioning contracts to review the independent special school fees to ensure we are receiving value for money and that fees are in line with the EHCP of the young person placed at the school.
- 3.10. All spend is currently being reviewed within Other Special Schools to mitigate the growing demand in this sector with forward planning of placements for the academic year 2023/24.

4. Risks

- 4.1. Changes in Senior Leadership - both within the Service and wider authority could see delays, advances or change in direction to current plans identified.

- 4.2. SEN placements continue to cause increase in the demand on the High Needs Block. Support from schools to take action to mitigate the growing demand and reduce the call on independent placements is necessary to ensure that we remain within the funding envelope received.
- 4.3. Recruitment and Retention - SEN 0-25 team have had 31 posts been agreed since 2021/22, however it has been difficult to recruit and retain these staff. Currently some of these vacancies are being met by agency staff, but this is insufficient for the demands being seen by the service.
- 4.4. Rising costs in fuel and energy may well result in additional charges being passported onto the local authority through higher independent placement costs.
- 4.5. Management actions delayed through increased volumes of requests and placements; new high-cost placements moving into the area; continuation of pandemic impact.
- 4.6. Quality data being held by the service needs to be made readily available to enable trend analysis and tracking of those placements that have an impact on the Management Plan.
- 4.7. Stakeholder Involvement is key. There is a need to get engagement from the schools and other providers to ensure the mitigation of the identified workstream / projects being achieved. In doing so the levels of EHCPs supported in mainstream settings will increase and therefore reduce the demand currently being seen within the independent sector.

5. Recommendation:

Schools Forum is asked to note the month 10 DSG update as set out above in section 1 to 4.

All to note

Angie Sinclair
Director of Finance and Public Value

Julian Wooster
Interim Chief Officer of Children's Services

Please ask for: Adrian Fox
Adrain.fox@devon.gov.uk

Education & Health Care Plans – Cost and Volume Analysis

High Needs EHCP Analysis	No of FYE Pupils				Budget 22/23	Forecast outturn	Variation		Budgeted Unit cost	Forecast Unit cost	Variation	Month 10			Month 9		Change to Mth 9		Month 9 No of FTE Pupils	Change to Mth 9 Pupils
	Budgeted 22/23	Month 10	Variation	%			£'000	£'000				£'000	%	£	£	£	Price Var £'000	Vol Var £'000		
Top ups	150	144	(6)	(4.2%)	1,943	2,072	129	6.6%	12,953	14,389	1,436	207	(78)	129	205	(78)	2	0	144	0
Medical Planned Places	90	90	0	0.0%	1,620	1,620	0	0.0%	18,000	18,000	0	0	0	0	0	0	0	0	90	0
Medical Planned Additional	39	33	(6)	(18.2%)	721	610	(111)	(15.4%)	18,487	18,485	(2)	(0)	(111)	(111)	(37)	(74)	37	(37)	35	(2)
AP WAVE Special Commission	13	27	14	51.9%	75	234	159	212.0%	5,761	8,667	2,906	78	81	159	90	69	(12)	12	25	2
AP Other [Non-WAVE]	92	147	55	37.4%	268	1,008	740	276.1%	2,913	6,857	3,944	580	160	740	569	64	11	96	114	33
Alternative Provision	384	441	57	12.9%	4,627	5,544	917	19.8%	58,115	66,398	8,283	865	52	917	827	(18)	38	71	408	33
Personalised Packages	91	87	(4)	(4.4%)	1,324	1,337	13	1.0%	14,577	15,368	791	69	(56)	13	93	(70)	(25)	15	86	1
Home Tutoring	105	180	75	41.7%	868	1,468	600	69.1%	8,267	8,156	(111)	(20)	620	600	(56)	653	36	(33)	184	(4)
Educated Other than at School	196	267	71	26.7%	2,192	2,805	613	28.0%	22,843	23,523	680	49	564	613	37	583	11	(18)	270	(3)
Mainstream Provision (pre 16)	2,593	2,417	(176)	(7.3%)	8,862	8,301	(561)	(6.3%)	3,418	3,434	17	41	(602)	(561)	39	(602)	1	0	2,417	0
Mainstream Provision (pre 16) Plus Packages	879	884	5	0.6%	9,342	9,480	138	1.5%	10,628	10,724	96	85	53	138	98	96	(13)	(43)	888	(4)
Mainstream	3,472	3,301	(171)	(5.2%)	18,204	17,781	(423)	(2.3%)	14,046	14,158	113	125	(548)	(423)	137	(506)	(12)	(43)	3,305	(4)
Further Education	785	820	35	4.3%	3,410	3,538	128	3.8%	4,344	4,315	(29)	(24)	152	128	116	60	(141)	93	799	21
Top Ups	1,611	1,590	(20)	(1.3%)	20,676	20,423	(253)	(1.2%)	12,838	12,842	5	8	(260)	(252)	14	(127)	(6)	(133)	1,601	(10)
Exceeded Places	0	12	11.83	100.0%	0	118	118	100.0%	10,000	10,000	0	0	118	118	0	108	0	11	11	1
Plus Packages	26	43	16.50	38.8%	372	613	241	64.8%	14,308	14,415	107	5	236	241	(6)	211	10	25	41	2
Maintained & Academy Special Schools	1,637	1,645	8	0.5%	21,048	21,154	106	0.5%	37,145	37,258	112	13	94	107	8	191	4	(97)	1,652	(8)
Sole Funded	1,115	1,126	11	1.0%	52,329	55,863	3,534	6.8%	46,413	49,128	2,715	3,058	530	3,588	3,244	1,021	(186)	(491)	1,137	(11)
Joint Funded	23	19	(4)	(23.2%)	2,736	1,728	(1,008)	(36.8%)	131,109	108,717	(22,392)	(418)	(568)	(986)	(493)	(535)	75	(33)	19	(0)
Adults	12	5	(7)	(143.9%)	633	516	(117)	(18.5%)	63,406	103,695	40,289	198	(449)	(251)	198	(449)	0	0	5	0
Virtual School	2	0	(2)	(1076.5%)	20	2	(18)	(90.0%)	10,000	10,000	0	0	(18)	(18)	0	(10)	0	(8)	1	(1)
Independent Special Schools	1,152	1,150	(2)	(0.2%)	55,718	58,109	2,391	(5.9%)	250,928	271,540	20,612	2,838	(505)	2,334	2,949	27	(111)	(532)	1,162	(12)
Resource Bases (Topup)	133	77	(56)	(72.2%)	933	811	(122)	(13.1%)	6,998	10,476	3,478	269	(391)	(122)	302	(391)	(33)	0	77	0
Reported Forecast Outturn 2022/23	7,625	7,624	(2)	(0.0%)	105,199	108,931	3,732	3.5%				3,866	(190)	3,676	4,075	336			7,596	28

22 March 2023

2023/24 Advanced notice of planned carry forwards

Report of the Director of Finance and Public Value and Interim Chief Officer of Children's Services

Recommendations

It is recommended that Schools Forum:

- a) Agree in principle the surplus budget carry forwards to 2023/24 as set out in Table 1.
All to vote

1. Surplus Carry Forward Requests

- 1.1. The table below sets out all current known (estimated) carry forward requests, these will be confirmed and finalised during the closedown process. The total DSG overspend as at month 10 is £41.1 million after allowing for the requested carry forwards as detailed below:

Table 1: Surplus budget carry forward requests

Budget Line	Amount £'000	Notes
Growth Fund	2,709	Rolled forward 2022/23 underspend to fund ongoing growth fund
Total Central Provision	2,709	
Schools and DSG Contingency	550	Rolled forward to fund contingency agreements in 2023/24 onwards
	640	Rolled to fund School Effectiveness team in 2023/24
Maternity	150	Rolled forward 2022/23 underspend to fund ongoing maternity fund
Total De-delegated budgets	1,436	
Hospital Education	16	Rolled forward 2022/23 underspend
SEND 100	22	Rolled forward to fund Support of Projects
SEN 100 Projects	877	Rolled forward balance of SEND 100 Projects budgets to 2023/24
Total High Needs	915	
Early Years Pupil Premium	100	Project proposal currently being produced
Total Early Years budget	100	
Total Carry forward requested	5,074	

- 1.2. Maintained School balances and Special School balances will automatically carry forward to 2023/24 in individual budgets. The values of these will not be known until year end accruals have been undertaken.
- 1.3. We are asking schools to explain both surplus and deficit balances as part of the year end accruals process in 2022/23 to remove the chasing of such data during May and June as in previous years.

Agenda Item 8

2. Recommendations

1. Schools Formula to agree in principle surplus budget carry forwards to 2023/24 as set out in Table 1.

Angie Sinclair
Director of Finance and Public Value

Julian Wooster
Interim Chief Officer of Children's Services

Please ask for: Adrian Fox
Adrian.fox@devon.gov.uk

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 7 March 2023

Key Issues for DEF to Note:

Admissions:

2. Delayed Entry to secondary school

Secondary Heads have supported requests for delayed admission into Year 7 and have made sure that parents are aware of potential issues of their child being out of normal chronological year group for FE. LA will write to all primary schools with lists of known children taught offset by one year. Schools to discuss progression with parents and secondary schools.

4. Secondary School Admissions round – PANs – 2023

- LA seeking to work collaboratively with schools to ensure that local children are able to access a local school place where PAN has previously been reduced and the school is now oversubscribed but with unused physical capacity in the school and the lack of statutory guidance/powers to direct own admissions authorities.

SOCA recommended that DEF:

- Support the LA in their discussions with the Regional Director's Office over the challenges they are having accessing state funded education capacity.
- **At 22 March meeting:** Scrutinise and discuss the 2023/4 Year 6-7 transition round for learners with EHCPs given the level of concerns about the strategy and equity of decisions being made, and implications for those schools seeing large numbers of students being allocated a place

5. Non-pupil dates 2022-23 academic year

- Legislation to be in place from 15 March to allow extra Bank Holiday relating to coronation of King Charles III, reducing the number of days maintained schools need to open during the academic year.

6. Early Years Update

- Significant concerns around funding and the impact on ongoing viability of childcare providers, recruitment and provision.

7. School Organisation:

- First Round approval confirmed by DfE for development of a new 70 place special school in Cranbrook, moving towards a continuum of learning not currently in place for SEMH students within the state funded sector. This is hoped to enable decommissioning from placements in the costly independent sector.

Agenda Item 9

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 7 March 2023

Attendance

DCC

Neil Pateman (chair)	Built Environments Capital Programme Manager
Shona Meek	Senior School Organisation Officer
Andrew Brent	Senior Policy Officer
Fran Butler	Early Years and Childcare Sufficiency Lead
Heidi Watson-Jones (notes)	Service Support Officer (E&L)

Devon Schools Leadership Services

Primary

Penny Hammett (Apologies)	FORT Federation
David Perkins	Littletown Primary

Secondary

Phil Randall	St Peter's C of E VA School
Graham Hill	Pilton Community College

Special School Heads

Stuart Allman	Pathfield School
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DAG

Ian Rogers

Diocesan Representatives

Vacancy	Diocese of Plymouth
Christina Mabin (apologies)	Exeter Anglican Diocese (Admissions)
Richard Power (apologies)	Exeter Anglican Diocese (Capital)

Union Representative

Nigel Williams	Corporate Forum (Education) NASUWT
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In Attendance

Nick Cook - part	South West Norse
Simon Niles	Strategy, Schools Planning and Admissions

1. Minutes of Previous Meeting – 6 December 2022

Outstanding actions:

- AB to provide data on families not receiving a place on any of their 3 preferences.
- Communications being drafted to primary schools re. children of year 5 age who are offset from their year group.
- FB and AB to liaise re. inclusion of nursery policy document on DCAF form.
- NP to discuss with finance colleagues details around split sites.
- All other actions complete.
- Minutes agreed as an accurate record.

2. Admissions: Delayed Entry to secondary school

- All requests re. delayed admission from last transfer round have been accepted by secondary schools.
- Heads have supported requests moving forwards and have made sure that parents are aware of potential issues at FE. Discussions have taken place with Petroc in N Devon.

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 7 March 2023

- LA will write to all primary schools with lists of known children taught offset by one year. Schools to discuss progression with parents and secondary schools.
- Early Years to consider further messaging for parents wishing to take up option to delay entry for summer-born children.

3. Admissions: Determined Admission Arrangements 2024 - 25

- Cabinet have considered coordinated scheme and those of individual admission authority schools.
- Now considering future proposed policy for schools.

4. Admissions: Secondary Admissions round - PANs – 2023

- Noted issues recently experienced during the latest secondary schools admissions round.
- LA seeking to work collaboratively with schools to ensure that children are able to access a local school place where PAN has previously been reduced and the school is now oversubscribed but with unused physical capacity in the school.
- SOCA noted the lack of statutory guidance or powers to direct own admissions authorities.
- SOCA members were informed of the challenges the Admissions Service were facing for normal round and in-year admissions with schools concerned about the financial implications and potential impact on in-year admissions challenges when opening up additional capacity.
- Schools have previously been supported to lower PAN, but with no reduction in physical capacity. During the 23/24 admissions round, some Trusts which have previously lowered PAN have not been inclined to then raise the PAN to respond to increased popularity.
- Impact is that local children, children applying late (often most vulnerable), and siblings of existing pupils are unable to access a local school place, with a possible impact also on future Section 106 funding.
- Policy concerns have been raised to the Regional Director's Office as PANs no longer match the physical capacity that is available and required across the county. Mindful that schools are acting legally, but the situation remains unhelpful
- Understand there are concerns from schools around volume of in-year admissions – which may need further consideration of growth funding to address.
- SOCA noted current secondary school waiting lists – noting that not all schools with a waiting list have physical capacity to admit further pupils. Discussions are ongoing with individual schools around establishing additional classes, particularly where there are no other schools in the locality.

Impact of SEND

- SOCA members raised concerns and ongoing frustration regarding the allocation of learners with EHCPs, in particular where a number of schools have seen high numbers of out of catchment places at the expense of in-area learners and siblings; Year 6-7 cohorts are no longer reflecting local communities.
- Heads highlighted that there is little strategic oversight of the distribution and provision of EHCPs. Noted Ofsted does not scrutinise the nature of SEN cohorts within schools.
- SOCA agreed to recommend that DEF scrutinise and discuss the 2023/4 Year 6-7 transition round, and support the LA's request that the RD office formally reconsider policy and practice around fair admission of children with EHCPs to their local school.

Agenda Item 9

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 7 March 2023

- SEN 'magnet schools' require additional funding, staffing and expertise to properly provide a valuable educational experience where there is a high percentage of SEN children within each year group.
- Mindful of similar issues being experienced in Early Years settings and Primary schools.
- Considered impact of increase in EHE pupils and the challenges for schools and the LA in meeting expectations for an inclusive education provision. Mindful that it can be challenging for schools and admissions team to engage with parents of EHE learners to consider admission into secondary. Suggested that wider sharing of data and narrative around transition into EHE and admission of children from EHE arrangements would be helpful.
- **SOCA recommended that DEF:**
 - Support the LA in their discussions with the Regional Director's Office over the challenges they are having accessing state funded education capacity.
 - Scrutinise and discuss the 2023/4 Year 6-7 transition round for learners with EHCPs given the level of concerns about the strategy and equity of decisions being made, and implications for those schools seeing large numbers of students being allocated a place.

ACTION:

- **AB / SN** to draft report for DEF

5. Admissions: Non-pupil dates 2022-23

- Legislation in place from 15 March to confirm additional non pupil day relating to King Charles III's Coronation, reducing the number of days maintained schools need to open during the academic year.

6. Early Years Update

- Significant concerns around funding and impact on ongoing viability of childcare providers, recruitment and provision.
- Provider and parent surveys have been launched – both with a focus on cost of living and affordability of childcare provision.
- Feel that more parents may increase reliance on family and friends to provide childcare rather than settings – results to be shared when available.
- All Private, Voluntary and Independent sector providers encouraged to complete the Early Years census as responses impacts on level of funding coming into the LA.
- SOCA considered data around the take up of places for 2, 3 and 4 year olds.
- Early Years Pupil Premium – noted many families in receipt of EYPP are eligible for 30 hour funding for 3 and 4 year olds.

7. School Organisation Update

- Stoke Canon CofE consulting to extend age range from Easter to include nursery class.
- Mill Water – consulting on closure of post 16 provision and change to 3-16 age range, increasing number of places.
- Noted schools proposing expansion: awaiting decisions from RD office.
- Particular thanks to Braunton Academy for close working with the LA to expand and increase admissions of local pupils.
- Hearing Support Centre at Clyst Vale consulting to close (RD office decision).
- Currently formally consulting on future term dates.
- SOCA noted academy proposals and decisions at: Horwood and Newton Tracy, Pilton Infants, Newtown, Sidmouth College, Gulworthy & Lamerton

Schools Organisation, Capital and Admissions Group: Notes of meeting on Tuesday 7 March 2023

- Noted consultation for merger of Uffculme Academy Trust and Castle Partnership Trust in Somerset.
- Noted summary of updates to DfE statutory guidance. Policy does not currently equitably match particular needs across academy and maintained schools with different processes and triggers for depending on sector.
- Noted updates on Local Plans. LA officers planning to engage with Local Learning Communities / local groups of schools to consider impact of local planning arrangements on schools.
- Funding Agreement now in place with Ted Wragg MAT re. Matford Brook Academy
- The Promise Special School planning to move to new site in Okehampton from Easter
- First Round approval confirmed by DfE for new special school application in Cranbrook, 70 place school – year 5-11 hopefully open from 2026. This will help to move towards a continuum of learning not currently in place for SEMH students within the state funded sector. This is hoped to enable decommissioning from placements in the costly independent sector.
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8. SW Norse Update

- Noted impact on Devon Maintenance Partnership with ongoing transfer to academy status. Not all of these schools are moving to Devon Academies Maintenance Agreement.
- SOCA noted contractor compliance levels.
- SW Norse and LA monitoring contractors to ensure improvement in performance.
- Service Term Contracts to end 31 March 2023, work ongoing to reset new arrangements.
- Updated graph to be circulated to group.

9. Capital Programme Update

- Medium Term Capital Programme approved at February Cabinet.
- FOI from ITV news received by several schools regarding reinforced concrete – response drafted by LA for affected schools.

ACTION:

NP to circulate draft FOI response issued for schools

Future meeting dates:

- **Tuesday 23 May 2023** (9.30 – 11.30)
- **Tuesday 26 Sept 2023** (9.30 – 11.30)
- **Tuesday 5 December 2023** (9.30 – 11.30)
- **Tuesday 5 March 2024** (9.30 – 11.30)

