

## **Schools Finance Group: Notes of meeting on Wednesday 15 July 2020**

### **Attendance**

#### **DCC**

Karlien Bond (chair)  
Adrian Fox **Apologies**  
Dawn Stabb  
Heidi Watson-Jones (notes)

Senior Accountant (Schools)  
Head Accountant (Education & Learning)  
Head of Education & Learning  
Service Support Officer (E&L)

#### **DAPH**

Jonathan Bishop **Apologies**  
Alun Dobson  
Penny Hammett (*for JB*)  
Jamie Stone (part)  
Paul Walker (part)

Cornerstone Academy Trust  
Marwood Primary  
FORT Federation  
Denbury Primary  
First Federation MAT

#### **DASH**

Daryll Chapman  
Sammy Crook  
Andrew Davis  
Lorraine Heath **Apologies**  
Matthew Shanks

Dartmoor Trust  
Tiverton Federation  
Exmouth Community College  
Uffculme Academy  
Education South West

#### **SENtient Heads**

Keith Bennett **Apologies**  
Jacqui Warne **Apologies**

Marland School  
Learn to Live Federation

#### **DAG**

Faith Butler  
Malcolm Dobbins  
Alex Walmsley

Special School Governors  
Primary Governors  
Secondary Governors

#### **Early Years Providers**

Lydia Wright

Early Years / PVI providers

#### **Other DCC Officers**

Julia Foster  
Katrina Harverson  
Donna Anstiss  
Helen Moltano (part)

Senior Manager SEND  
Senior Accountant (Education)  
Accountant (Education)  
Consultant

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### 1. Minutes of Previous Meeting – 3 June 2020

- AF has sought further clarity on recovery plan from DfE but awaiting feedback
- Agreed that costs would be covered by the Mutual Fund for additional hours worked by part-time staff during Covid. Mutual Fund webpages have been updated to reflect this.
- Minutes agreed as an accurate version.

### 2. DSG Month 2 Report

- Updated report circulated.
- Carry forwards have now been agreed and will be included in month 4 report.
- £168k in year deficit predicted for High Needs Block. Noted increases particularly in Plus Packages, and mainstream SEN.
- Independent Special Schools showing a favourable variance due to reductions in cost and placement numbers. Task & Finish Group looking at contracting arrangements and suitability of core provision offers.
- **DSG Recovery Plan** – deficit reserve to be carried forward as per DfE Guidance. Revised guidance and deadline awaited from DfE. AF to attend national working group considering the detail and implications.
- Noted the presentation of the DSG negative reserve in the budget report is as prescribed by DfE. **ACTION: DS and AF** to consider how this may be presented differently for next report
- **Impact of Covid-19 Pandemic** – noted DfE expectation that schools will use any surplus budget position to cover unexpected costs. Covid-19 impact has not been identified in the budget pressures currently reported.
- **Longer term impact of Covid-19 on EHCP demand** will be monitored.
- SFG discussed comparison against other local authorities with respect to the deficit funding gap. Noted that benchmarking against other LA positions and cost drivers is in hand and that Devon officers are involved in national working groups to consider the issues in advance of further DfE guidance.
- F40 and Worthless are involved in ongoing lobbying for school funding reform.
- Considered use of Plus Packages – a mechanism for enabling children with SEN to remain in mainstream schools. This arrangement appears to be becoming more of a normal way of working, and the consistency and cost of these packages will be monitored from September.

#### Action

**DS & AF** to discuss how to achieve further clarity of presentation of HNB deficit reserve.

### 3. SEND / High Needs Update

#### Independent Special Schools

- Statutory Assessments and naming placements have been maintained during Covid-19, the latter to ensure that all children are linked to an educational setting for safeguarding purposes. Reduced fees have been negotiated for new starters with independent settings where children would not be attending due to Covid-19.
- The Independent sector is still being widely used and an increase in capacity in maintained special school provision continues to be pursued.
- Currently investigating the development of a new SEMH school and seeking free school presumption for a site in Okehampton.

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- Noted increasing parental requests for placements in a small setting, resulting in an increase in placements in mainstream independent schools.
- Noted that parental confidence in mainstream schools being able to provide for their children's SEN is a factor in parental preference.
- Discussed how LA/school evidence and witnesses around suitability of LA schools to meet SEN needs compared to independent schools needs to be more robust, and Tribunal findings are predominantly in favour of parental preference.
- Independent providers are in a strong position to determine their own fee levels to accommodate particular learners. Lobbying is taking place nationally to review the legal position around the funding of independent settings through the DSG High Needs Block.
- Noted Magdalen Court school seeking to move from a mainstream to specialist provider.
- Expecting an increase in requests for post 16 provision to be extended due to the impact of Covid-19.
- During Covid-19, QA checks all independent providers have been undertaken and the LA has in the main been assured that processes and practice are appropriate.
- SFG discussed placements jointly funded with care and health. The group was reminded of the agreement of a 50/50 split for places jointly funded with children's social care. Adult social care funding agreement is different, and funded in line with ASC assessment protocols, with education funding the remainder of the placement cost.

### 4. Mutual Board and Appeals

- Noted £590k surplus currently being held.
- Predicting an increase in claims from September, and these may be higher than normally seen, due to Covid-19 impact.
- Options for either increasing benefit or reducing the premium will be considered.
- Heads suggested that a rebate for schools unable to access the fund during the Covid-19 period due to operational issues might be a helpful way forward.
- Options will be modelled when the impact of Covid-19 period on claims has been seen.

#### Action

Options to be modelled for appropriate distribution of excess surplus balance following assessment of Covid-19 impact on claim levels. **KB**

### 5. SEND 100 Project

- Project scope has been developed by Helen Moltano, with Dawn Stabb, Alun Dobson and Matthew Shanks.
- Next steps will involve discussions with Heads, teachers and SENDCos to consider how different types of SEN outreach provision might build confidence in mainstream schools to better support children with SEN without seeking formal EHCP assessment.
- Considered how MAT structures may be able to provide an additional perspective.
- Helen Moltano will liaise with Parent Carer Forum to seek parent views over the summer.

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- Aim for this investigative work to be completed by end of September, in time to be communicated at autumn funding consultation. DAG requested sight of a draft report when available.
- Noted that this project will align with the wider SEND Transformation process which is now beginning to move forward.
- Mindful of the rise in the number of EHCPs in the Primary sector and requested Early Years involvement in the investigations. **ACTION: Lydia Wright and Helen Molteno** to liaise with Helen regarding this.

### Action

**Lydia Wright and Helen Molteno** to liaise with Helen regarding Early Years involvement in the SEND 100 investigations.

## 6. Any Other Business

### Growth Fund

- Update on situation requested for next SFG.

### Autumn 2020 Schools Funding Consultation

- Noted that the July SFG meeting has historically been used to agree dates and themes for the autumn consultation process. Heads had concerns that their time will be incredibly pressured to consider this in September and hoped for some clarity around intended way forward prior to the end of the academic year.
- Understand DfE guidance has not yet been issued on school funding for 2021/22 which is delaying preparation of proposals by Finance officers.
- **DS and AF** to discuss provisional dates for consultation events.
- Noted SFG planning day will remain in diary for 9<sup>th</sup> September 2020.
- **Items for DEF** to be agreed at next meeting
- Thanks were extended to Daryll Chapman and Matthew Shanks for their significant contribution to the Schools Finance Group and best wishes to Daryll on his anticipated retirement from September. Matthew Shanks will be taking on a Trustee role for the Devon Schools Leadership Services CIO.

### Action

**Dawn Stabb and Adrian Fox** to discuss potential dates and format for funding consultation events to be circulated prior to end of term if possible.

### Next meetings:

Wednesday 9 September 2020 (9.15 – 4.30pm) – Arrangements tbc - possible Teams Meeting

Wednesday 4 November 2020 (9.15 – 12.45pm) – Teams Meeting

Wednesday 6 January 2021 (9.15 – 12.45pm) – tbc - possibly Larkbeare Knightshayes

Wednesday 3 March 2021 (9.15 – 12.45pm) – tbc – possibly Larkbeare Knightshayes