

## Schools Finance Group: Notes of meeting on Monday 11 July 2022

### Items for DEF to note:

- Item

### **ATTENDANCE**

#### **DCC**

Mat Thorpe (chair)	Senior Assistant County Treasurer
Adrian Fox	Head Accountant (Education & Learning)
Jackie Ross	Interim Deputy and SEND Strategic Director
Heidi Watson-Jones (notes)	Service Support Officer (E&L)

#### **Devon Schools Leadership Services**

##### **Primary:**

Alun Dobson	Marwood Primary
Jamie Stone	Denbury Primary
Paul Walker	First Federation Trust

##### **Secondary:**

Sammy Crook ( <b>apologies</b> )	Tiverton Federation
Andrew Davis ( <b>apologies</b> )	Exmouth Community College
Lorraine Heath	Uffculme Academy

##### **Alternative Provision:**

Rob Gasson	Wave Multi Academy Trust
------------	--------------------------

##### **Special Schools**

Keith Bennett	Marland School
Hannah Smart ( <b>apologies</b> )	ACE Tiverton Special School

##### **DAG**

Faith Butler	Special School Governors
Alex Walmsley	Secondary Governors
Adrian Hines ( <b>apologies</b> )	Primary Governors

##### **Early Years Providers**

Gemma Rolstone ( <b>apologies</b> )	Puffins Childcare
-------------------------------------	-------------------

## **SCHOOLS FINANCE GROUP**

### **1. Minutes of Previous Meeting – 6 June 2022**

- Seeking support from District Councils to meet their requirement to manage non domestic rates.
- HNB sub group / JR to consider adjustment of management plan impact as a result of Babcock in-housing and changes to SEND Transformation. Safety Valve Intervention Programme confirmation still awaited from DfE. SEND Ofsted letter published today (11 July).
- SFG had requested costing modelling demonstrating impact of equitable funding methodology across AP and special school places.
- SFG considered impact of a reduction in earlier intervention places as a result of increased permanent exclusions. **ACTION:** Further discussion to take place at High Needs Funding sub group to consider funding of all specialist placements.
- **Growth fund** – Homes for Ukraine funding from DfE methodology now shared; impact on Growth fund to be assessed.

## Schools Finance Group: Notes of meeting on Monday 11 July 2022

- Noted other LAs includes direct surplus growth fund balances to bring schools up to NFF levels, through AEN and other NFF factors e.g. sparsity.
- Funding allocation information from DfE expected end July.
- Noted growth funding is now formula led based on MSOA factors. SFG considered if Devon's growth fund allocation rates are at the right level to ensure resources are allocated appropriately in areas of growth.
- **ACTION: AF/finance** to model areas of growth and funding impact for consideration at September SFG.
- **Plus Packages** - Noted data circulated showing growth in allocation of plus packages. SFG would welcome further exploration of the process, criteria, and decision-making processes around this provision.
- Queried what the costings outlined in the data represents.
- Considered establishing a process to moderate agreement of plus packages.
- Minutes agreed as an accurate record.

### **ACTIONS:**

- **AF/ finance** – to model of areas of growth and funding impact for discussion at September SFG
- **JR/AF/RG** to discuss funding of specialist placements for further consideration at September SFG following publication of funding allocations end July.

## **2. Actions from DEF**

- DEF briefing from Parent Carer Forum Devon sharing feedback from the Autumn 2021 parent survey which informed SEND Ofsted findings and outcomes.

## **3. DSG Monitoring – Month 2**

- Month 2 position noted
- Noted impact of delays to Safety Valve projects resulting to slippage within the management action plan.
- High Needs Funding subgroup to consider a review of specialist resource base provision, and the moderation process for placements. Reports discussed at High Needs Funding subgroup to be shared via Teams site.
- DSG deficit is due to be moved to DCC reserves by 1 April 2022. Mindful of the potentially destabilising impact on the local government sector nationally. Expecting that Safety Valve outcomes will be shared in due course including confirmation of inclusion in the programme, timeframe and pay points.
- Considered possible request for funding transfer at autumn school funding consultation.

## **4. EOTAS and Medical provision – AWPU recovery**

- SFG considered joint proposal from Marc Kastner (Inclusion) and Julia Foster (SEND) and felt that AWPU should follow the child when leaving a setting as a result of permanent exclusion (PEX), or moving to an EOTAS arrangement. A process was proposed to reclaim AWPU where EOTAS and S.19 medical AP provision placements are made.
- A transfer of AWPU could be calculated on a part-year basis, but would not be dependent on the child being on roll at census. This could result in schools having funding removed when AWPU has not yet been calculated due to timing of the child leaving the school roll.

## Schools Finance Group: Notes of meeting on Monday 11 July 2022

- **ACTION: Finance** to track data where AWPU has been transferred following a permanent exclusion where the child's funding had not been received by the school.
- SFG members agreed that funding should follow the child to provide support for vulnerable learners, and to support high needs block situation.
- However, concerns were raised that this could in effect be a disincentive for schools to refer children unable to access school, and LA would need to ensure that schools are supported to carry out their duties around providing education.
- The group considered the inclusion of pupil premium in this process as this element is allocated to the school, rather than the pupil, and can be deployed more strategically within the school.
- Considered the potential inequity around transfer of funding for children between mainstream settings, and the impact of lagged funding. JR confirmed that funding could not be transferred where a child is moving to an Elective Home Education arrangement.
- SFG discussed potential protection for extenuating circumstances (e.g. if a small school moved several learners to AP).
- SFG considered the cost effectiveness of providing better support to mainstream settings to enable pupils to remain on roll, rather than transferring AWPU to alternative providers that may not be effective or of good quality.
- Suggested a review of AP provision funding is needed in the wider context of specialist provision. This would include reviewing the decision making process and by whom. Considered the impact of the current lack of capacity in AP provision.
- SFG supported the principle that if a child leaves a school roll for the reasons outlined, then AWPU is transferred, and recognised that as process is under particular scrutiny through Safety Valve discussions with the DfE there would be strategic risk associated with not following national operational funding guidance.
- **AGREED:** SFG to propose recommended way forward to DEF (as outlined below), with close monitoring of the number of EOTAS packages being agreed.

### **SFG recommends that DEF support:**

- i) The transfer of AWPU and per pupil funding (e.g. Pupil Premium) for pupils who are removed from a mainstream school roll, for reasons other than permanent exclusion, and are receiving education funded by the local authority other than at a school (EOTAS)**
- ii) The transfer the AWPU and per pupil funding for each term that the pupil is in alternative provision funded by the LA.**

### **ACTION:**

- **Finance** to track data where AWPU has been transferred following a PEX prior to census where child's funding has not been received by the school.
- **DEF** to consider the recommendation at next meeting (September 19) (**HWJ / Fiona Rutley for DEF agenda**)

## **5. Early Years Funding Consultation**

- Consultation with Early Years providers between 11 – 31 July seeking views on reduction of deprivation funding, and movement of targeted SEND funding to inclusion funding which would be more suitable for providers to access.

## Schools Finance Group: Notes of meeting on Monday 11 July 2022

- Consultation to take place with all Early Years providers during Summer Term 2022 and report back to School Finance Group on the following proposals:
- Remove Targeted SEND funding (£41k) from September 2022.
- Re-allocate £100,000 budget between deprivation and SEND to meet demand.
- £100,000 Disability Access Funding carry forward from 2021/22 will be used to fund SEND pressures (one-off)

### 6. Mutual Fund Board – monitoring and appeals

- £144k underspend currently projected, based on a pre-pandemic spend profile. Close monitoring will continue.
- Report noted

### 7. National Funding Formula

- Detail from ESFA is expected to be released just prior to the summer break.
- Experience of other LAs indicates that involvement in the Safety Valve process could enable a funding transfer between blocks across multiple years.
- Safety Valve projects to be shared with schools to highlight the support that will be available for schools to access better specialist support for vulnerable learners and reduce reliance on costly independent placements.
- Within October schools funding consultation, it is anticipated that a funding transfer will be requested for one year initially. Clarity was requested on how that funding could be allocated; SFG acknowledged that the DfE will expect schools to contribute to any agreed Safety Valve arrangement and continue to work closely with children with SEND.
- Noted 2023/24 will see a further funding uplift, but details of new formula rates and any pay awards are still to be confirmed.
- Identification of schools with a high proportion of high needs would demonstrate strategic intention to improve support for children with SEN.
- Ongoing corporate involvement in groups such as F40 remains important.  
**ACTION: High Needs Funding Subgroup** to draft briefing note for Elected members and MPs.

#### Autumn consultation (2023-24)

Proposed consultation period: **Mon 3 Oct – Sun 16 Oct**

Proposed virtual events on: **Wed 5 Oct (pm) & Thurs 6 Oct (am)**

- SFG considered whether complex messaging may be more effectively communicated in face-to-face consultation events.
- Mindful of very low consultation response rates over the last 5 years and the cost involved in hosting a face-to-face event.
- **Agreed** to hold one virtual and one hybrid consultation event

### 8. Items for DEF / Any Other Business

#### Future meetings (virtual / face to face)

- Agreed to continue with Teams meetings in general. However, September SFG to be face to face to facilitate planning for consultation events.

#### ACTIONS:

- **HWJ** to book meeting room for 14 September.

**Schools Finance Group:  
Notes of meeting on Monday 11 July 2022**

**Next meetings:**

- **Wednesday 14 September 2022** (09.15 – 12.00 – venue TBC)
- **Wednesday 9 November 2022** (09.15 – 12.00 – venue TBC)
- **Friday 6 January 2023** (09.15 – 12.00 – venue TBC)
- **Wednesday 8 March 2023** (09.15 – 12.00 – venue TBC)