

## SCHOOLS' FORUM

**Day:** Tuesday  
**Date:** 16 March 2021  
**Time:** 10.00 am  
**Place:** Zoom Meeting

Item No.	AGENDA	Page No
1.	<b>APOLOGIES FOR ABSENCE</b> To receive any apologies for the meeting from Members of Schools' Forum.	
2.	<b>DECLARATIONS OF INTEREST</b> To receive any declarations of interest from Members of Schools' Forum.	
3.	<b>MINUTES OF SCHOOLS' FORUM MEETING 14 JANUARY 2021</b> To consider the minutes of the meeting of Schools' Forum held on 14 January 2021.	1 - 12
4.	<b>EARLY YEARS FUNDING 2021-22</b> To consider a report from Assistant Director, Education and Assistant Director, Finance on the arrangements concerning the Dedicated Schools' Grant (DSG) Early Years funding for 2021-22.	13 - 16
5.	<b>SCHOOLS' FORUM FORWARD PLAN</b> To consider a report from the Assistant Director, Finance and Assistant Director, Education outlining reports and meeting deadlines for the financial year 2021-22.	17 - 20

This page is intentionally left blank

# Agenda Item 3

## SCHOOLS' FORUM

14 January 2021

**Commenced: 10.00am**

**Terminated: 11.35am**

<b>Present:</b>	Karen Burns (Chair)	Primary Schools – Academies
	Susan Marsh	Governor, Primary Schools – L/A Maintained
	Lisa Lockett	Primary Schools – L/A Maintained
	Steve Marsland	Primary Schools – L/A Maintained
	Lisa Gallaher	Primary Schools – L/A Maintained
	Simon Brereton	Primary Schools – L/A Maintained
	Gemma Patterson	Primary Schools – L/A Maintained
	Kirsty Rimmer	Primary Schools – L/A Maintained
	Richard O'Regan	Secondary Schools – L/A Maintained
	Simon Wright	Primary Schools – Academies
	Heather Farrell	Primary Schools – Academies
	David Ainsworth	Governor, Secondary Schools – Academies
	Andrew Foord	Special Schools – L/A Maintained
	Rosario Sarno	Governor, Special Schools – Academies
	Anthony Benedict	Pupil Referral Service
	Anne Morgan	Tameside Teachers' Consultative Committee
	Elaine Sagar	Early Years Private, Voluntary and Independent Sector
	Elaine Horridge	Diocesan Representative
	Elizabeth Jones	Governor, Primary Schools – L/A Maintained
	Donal Townson	Governor, Secondary Schools – L/A Maintained
	Councillor Leanne Feeley	Executive Member
	Tim Bowman	Assistant Director, Education TMBC
	Christine Mullins	Finance Business Partner TMBC
	Louisa Siddall	Senior Accountant, TMBC
	Wendy Lees	Finance Manager, TMBC
	Bernadette Wilde	Head of Human Resources, Operations and Workforce
<b>Apologies for absence:</b>	Anton McGrath	14-19 Sector
	Gill McFadden	Business Manager, Secondary Schools – Academies
	Councillor Oliver Ryan	Executive Member

## 21 DECLARATIONS OF INTEREST

Elaine Horridge, Diocesan Representative declared an interest in Agenda Item 7, Exclusions – Determination of Budgets.

## 22 MINUTES

Consideration was given to the minutes of the meeting of the School's Forum held on 24 November 2020.

### RESOLVED

**That the minutes of the meeting of Schools' Forum held on 24 November 2020 be approved as a correct record.**

## 23 DSG BUDGET UPDATE 2020-21

Consideration was given to a report of the Assistant Director of Finance and the Assistant Director of Education, which provided an update on the Dedicated Schools Grant (DSG) budget for 2020-21.

It was outlined that there was a forecast surplus of £0.072m on the Schools Block, relating to rates rebates in schools that recently converted to Academy status, and rates charges being lower than estimated. It was further explained that this was partly offset by rates revaluations (relating to 6 schools) resulting in an increase in the costs of £0.019m. Members were also informed that there was a surplus of £0.251m relating to unallocated growth funding and it was proposed that any surplus be used to contribute to the DSG reserve deficit.

In addition, Members were also informed that there was forecast to be a small surplus on the Central School Services Block of £0.003m. It was explained that this was due to the cost of licences being slightly less than estimated. With regard to the Early Years Block, it was explained that there was a projected surplus of £0.395m.

Members of the Forum noted that the in-year overspend against the High Needs Block was now estimated to be £3.687m. This would be offset by the Schools Block transfer, leaving a projected year-end deficit of £2.838m. It was explained that this was an improved position and, as previously discussed, Members' attention was drawn to the slowing or flattening of growth.

It was discussed that a review of SEND support services had also identified savings in relation to staffing, previously charged to the High Needs Block. It was expected that the full effect of these efficiencies will be seen in next year's spend.

In relation to growth, Members were informed that Tameside had seen significant growth throughout the past 2-3 years, bringing the LA further in line with the national average. As the number of EHCP's was expected to increase to 1,832 by the end of the financial year, this would mean that the percentage of pupils holding EHCP's within Tameside would be 3.79%.

It was highlighted that growth projections were based on growth in the Special sector next year and that this would flatten as schools reach capacity. Resource bases were also expected to see continued growth, with the implementation of plans for new units across the borough. However, growth was expected to increase at a slower rate in the mainstream sector, flattening out in 2025.

In relation to the Early Years Block, it was explained that, due to the current COVID-19 situation, it was more difficult to complete the projections for spend, due to the impact on providers. At present, it was anticipated that there would be a £0.395m surplus at the end of the financial year. However, Members were informed that this could change significantly due to the changing nature of Government directives in managing the COVID-19 outbreak, and the rapidly changing environment.

Members were informed that, whilst the Autumn term saw the vast majority of providers re-open, participation had not yet returned to pre-COVID-19 levels. As a result, there had been a requirement for adjustment payments to 130 providers to top up Autumn participation levels.

It was explained that the final settlement for Early Years funding would not be announced until July 2021 and that the projections would continue to be updated and reported to Schools' Forum throughout the financial year.

A projected surplus of £0.075m from the centrally retained element of Early Years funding was outlined to members and, again, it was proposed that any underspend in the DSG be utilised to support the DSG deficit position.

In conclusion, it was outlined that, if the 2020-21 projections were accurate, there would be a deficit of £2.711m on the DSG. With this in mind, members were reminded that a Deficit Recovery Plan had been developed and submitted to DfE, as discussed in the previous School's Forum meeting. Members were informed that this position would continue to be closely monitored and regular updates would be provided throughout the year.

**RESOLVED**

- (i) That the contents of the report be noted and supported**
- (ii) That any unspent amounts be held in reserve to offset the High Needs deficit**

**24 DSG FUNDING FORMULA 2021-22**

Consideration was given to a report of the Assistant Director of Finance and the Assistant Director of Education with regard to DSG Funding for 2021-22, which provided information regarding the allocation of the Dedicated Schools Grant (DSG) funding for 2021-22.

Members of the Forum were informed that the provisional DSG settlement for 2021-22 of £229.965m was received on 17 December 2020. It was explained that all DSG funding must be deployed to schools and/or pupils in accordance with the School and Early Years Finance (England) Regulations 2020.

A breakdown of the latest settlements for the four blocks of DSG was provided, as follows:

<b>DSG Blocks</b>	<b>2020-21 £000</b>	<b>2021-22 £000</b>	<b>Increase £000</b>
Schools Block (includes Academies)*	169,918	183,081	13,163
High Needs Block	24,425	28,277	3,852
Early Years Block	17,261	17,494	232
Central Schools Services Block	953	1,114	161
<b>Total</b>	<b>212,557</b>	<b>229,965</b>	<b>17,408</b>

It was explained that the increase of £13.163m in Schools Block was related to the increase in pupil numbers, roll in of the teachers' Pay and Pension Grants, uplift for RPIX and increase in DfE funding rates.

The increase in High Needs Block funding was explained as relating to an increase in pupil numbers along with the 'per head' gain Tameside has seen as a result of the National Funding Formula (NFF).

With regard to the Early Years Block, Members were informed that the increase was related to the increase in DfE funding rates. Similarly, the increase in the Central Schools Services Block (CSSB) also related to an increase in DfE funding rates, which included an element of funding for the roll in of the central teachers' pension grant, along with increased pupil numbers.

It was explained that the Schools Block was the largest element of Dedicated Schools Grant funding and provided the majority of funding for mainstream schools and academies, with additional elements potentially being allocated through the Early Years and High Needs Blocks. It was outlined that the Schools Block settlement from the Department for Education was made up of the following funding:

1. A primary unit of funding (PUF) of £4,601.57
2. A secondary unit of funding (SUF) of £5,902.47

This core school funding covered all pupil and school led factors in the funding formula. Members of the Forum were made aware that Primary and Secondary units of funding were multiplied by the pupil numbers in Reception to Year 6 plus pupils aged 4 to 10 who were not assigned to a year group for Primary, and pupils in Years 7 to 11, plus pupils aged 11 to 15, not assigned to a year group for Secondary.

- Premises – this includes Private Finance Initiative (PFI) and business rates which were based on historical spend
- Mobility – to support schools in which a high proportion of pupils first join on a non-standard date
- Growth – this was calculated using the difference between the Primary and Secondary numbers on roll on the October 2019 and October 2020 school censuses

The report detailed the total Schools Block settlement for 2021-22 was £183.801m which included £7.574m of protected funding for the teachers' pay and pension grants. With regard to the proposed funding formula for Mainstream Schools, reference was made to the previous decision of Schools' Forum to support a disapplication request to the Secretary of State in order to move 1% from the Schools Block to the High Needs Block.

Forum Members were informed that a 1% transfer was not affordable within the funding settlement, whilst adhering to National Funding Formula (NFF) rates, as previously agreed with Schools' Forum. Therefore, should the disapplication request be approved, a transfer of 0.575% would be made, resulting in a £1.009m transfer from the Schools Block to the High Needs Block.

As Schools' Forum had also previously agreed to support a 0.5% transfer, in the event of the disapplication request being rejected, it was outlined that this would result in a £0.877m transfer of Schools Block funding to the High Needs Block. Members were informed that the £0.132m remaining would be added to the growth fund as unallocated growth in order to support any additional, unknown growth requirements.

It was explained that PFI funding continued to be de-delegated to the relevant schools and these figures had been uplifted by RPIX of 1.56%, which reflected the increase in the unitary charge paid for the delivery of PFI services, it was also explained that this element of funding would be recovered by the LA in 2021-22, as had been the case in previous years.

With regard to business rates, Members were made aware that these were funded to the equivalent value of the business rates charge for 2021-22. An estimate of business rates had been calculated, as the actual charges would not be available until late March/early April 2021, with adjustments being made accordingly, once charges were confirmed.

Members were informed that, for 2021-22, LAs were able to set the Minimum Funding Guarantee (MFG) between +0.5% and +2% per pupil. In the Schools' Forum paper, November 2020, proposals had been outlined to include a 0.5% MFG, which was the rate MFG had now been set.

Members were informed that for 2021-22, the gains cap required was 3.64% as opposed to the 3.21% which had been consulted on. This means that a gaining school will receive up to a 3.64% gain (0.5% as MFG plus 3.14% cap) on pupil led funding. Any gain above this is used to partly offset the MFG and allow a balanced DSG budget to be set.

The details of the report outlined growth within the borough. This was related to the Growth Fund policy agreed by Schools' Forum in June 2019. Forum members were made aware of the definitions of both explicit and implicit growth; how explicit growth related directly to the Growth Fund and how implicit growth related to adjustments to pupil numbers when calculating the funding; in this case for new and growing schools. Forum members were made aware that the estimated Growth Fund required in 2021-22 was £0.544m and, as stated in the Growth policy, the final growth allocation would be based on numbers taken from the October 2021 census.

As in previous years, Members of the Forum were asked to consider supporting safeguarding in the borough; through making a contribution of £0.103m towards the cost of Tameside Safeguarding Children Partnership (TSCP). All schools were asked to support the continuation of this arrangement for 2021-22, which equated to approximately £2.90 per pupil.

It was stated that, in December 2020, the provisional 2021-22 High Needs Block allocation of £28.277m (before Academy recoupment) was released. Members of the Forum were made aware that this was an increase in funding of £3.852m compared to the 2020-21 budget settlement.

It was explained that the number of commissioned places has been agreed with Special Schools and Resourced Units for September 2021 and an outline of commissioned places was provided for Members.

Forum Members were made aware that, as part of the High Needs Review, the LA had identified a review of Top Up rates. It was explained that this would be an extensive piece of work, of which the first stage was the launch of the Matching Need to Provision (MNTTP) document. It was outlined that future stages would include mapping current pupils onto the new document and costing these placements. With regard to this, Members were informed that data was currently being collected from special schools and it was expected that there would be no changes to funding until April 2022. With this in mind, current rates would remain for the financial year 2021-22.

Members were informed that COVID-19 had caused unavoidable delays with regard to the SEND review announced by DfE in September 2019. It is now expected that a consultation process would commence early this year with the intention that any outcome would inform 2022-23 funding. It was explained that this review would focus on:

- how the system has evolved;
- how the system can provide high quality support for SEND pupils as they prepare for adulthood including employment;
- support parents in making decisions on their pupils support;
- making sure support is joined up across health, care and education services;
- striking the balance between mainstream and specialist places; and
- understanding what is behind the rise in Educations, Health and Care Plans (EHCP's).

With regard to Early Years Funding, the report outlined that the increase in funding for 3 and 4 years olds and 2 year olds was as the result of an increase in the rates. It was explained that the rate the LA was funded for 3 and 4 year olds had increased by £0.06 from £4.59 to £4.65 and by £0.08 for 2 years olds, from £5.38 to £5.46.

It was stated that further consultation would need to be held with Early Years providers, regarding the increase and, therefore, an additional Schools Forum meeting would be required to agree the rates of allocation for this element of funding. Members were informed that a report would be completed for this additional meeting, with further information on the funding arrangements for the LA and for providers. It was agreed that this meeting would be scheduled for Tuesday 16 March 2021.

Consideration was given to the Central School Services Block (CSSB) and it was explained that this brought together:

- funding previously allocated through the retained duties element of the Education Services Grant (ESG);
- funding for ongoing, central functions such as admissions, which were previously top sliced from the Schools Block; and
- residual funding for historic commitments, of which there were none for Tameside MBC.

It was stated that the total allocation to the LA for 2021-22 was £1.114m. This was based on a per pupil element of £29.28 for ongoing duties, totaling £1.018m. An additional unit of funding for

centrally employed teachers of £2.77 had also been included to fund the pension increase (formally funded through the Teacher's Pension Grant) for central teachers providing £0.096m of funding. As National Copyright School Licenses were also funded from this block, the amount for 2021-22 is £0.180m.

It was further explained that operational guidance for 2021-22 required the Local Authority to formally request approval from Schools' Forum on central retention of the following:

- School Admissions;
- servicing of Schools' Forum; and
- contribution to responsibilities that LAs hold for all schools (the retained duties element of the ESG)

## **RESOLVED**

- (i) That the contents of the report be noted and supported**
- (ii) That the Funding Formula for mainstream schools be approved**
- (iii) That the Growth Fund be approved**
- (iv) That contribution to Tameside Safeguarding Children's Partnership be approved**
- (v) That the allocation of the Central Services Block be approved**

## **25 DE-DELEGATION AND RPA 2021-22**

Consideration was given to a report of the Assistant Director of Finance, the Assistant Director of Education and Assistant Director of People and Workforce Development with regard to de-delegation services and Risk Protection Arrangements (RPA) for 2021-22.

Members of the Forum were informed that de-delegated funds were a deduction from a school's budget share and were held centrally to fund relevant services. It was also clarified that this arrangement applied only to maintained primary and secondary school budgets, with each sector voting separately, each year, in relation to each of the services. With regard to academies, information relating to the option of procurement as a traded service was provided, and it was explained that this charge would be on the same basis as de-delegation.

An overview of the roles and responsibilities of trade union Support was provided. It was explained that Tameside schools have for many years had access to trade union Support through a Service Level Agreement arrangement that recognises the main trade unions and professional associations that support the various public sector employee groups across the whole school workforce.

Furthermore, it was made clear that this support provides schools with centrally co-ordinated trade union services to support schools' and leaders' statutory obligations. In particular, it was explained that this provides schools, school leaders and governing bodies with support and expertise in employment related matters, helping to resolve workplace issues early on. It was also highlighted that this could provide a significant and positive contribution to school leaders with their management of change; any large scale reorganisation leaders may wish to implement; and the implementation of employment related policies and procedures.

Members were informed that local trade union representatives undertake a variety of roles in collective bargaining and working with school leaders and managers, communicating with union members, liaising with relevant trade unions at regional and national level and greatly assisting in the handling of individual matters concerning school based employees.

The role was described as being complex and, as such, having local knowledge and understanding of the Tameside School Campus' aims and aspirations for students in the borough would bring many benefits in ensuring positive and collaborative employee relations within a school's workforce.



In particular, it was highlighted that the support and collaborative working between local trade union representatives, school leaders and school-based employees had never been more prevalent than during 2020, whilst schools had been 'living with COVID'. Members were informed that local trade union representatives had supported schools to react appropriately and quickly when dealing with constant change and when implementing safe, sensible and pragmatic decisions in terms of pupils, staff, parents and visitors wellbeing.

A summary of areas of activity for trade union representatives to be involved with was provided, including:

- terms and conditions of employment, or the physical conditions in which workers were required to work;
- engagement/non-engagement, or termination or suspension of employment, or the duties of employment of one or more workers;
- allocation of work or the duties of employment as between workers, or groups of workers;
- matters of discipline;
- trade union membership/non membership/facilities for trade union representatives; and
- machinery for negotiation or consultation and other procedures.

The positive benefits for school leaders, employees and union members were also outlined, including:

- time and resources directed solely to Tameside schools' priorities with less competing and conflicting demands;
- progression of employee relations issues within schools undertaken and concluded in a timely manner;
- full knowledge and understanding of local needs and pressures;
- progression of school employment procedure review and implementation undertaken more speedily;
- the development of effective, collaborative working relationships to enable smoother progression of school based organisational matters, such as school staffing re-organisation and health and safety matters;
- locally based services, resulting in easier access and speedier responses to requests for service; and
- direct access to senior officers within the Council's Children's Services Directorate, acting as mandate and lobbyist for school leaders/school based staff and school related matter.

Members of the Forum were informed that regular benchmarking exercises with neighbouring authorities were attempted. It was acknowledged that receiving responses to benchmarking exercises could be problematic, due to the conflicting priorities of neighbouring authorities and their capacity to complete. However, it was clear that the majority of respondents offered a Trade Union Support SLA under de-delegation, with the large proportion offering both teaching and non-teaching recognised trade unions. It was felt that this approach remained appropriate for Tameside, taking account of recent data received from the local Tameside UNISON branch, which advised they support around 1400 school-based UNISON members within the Tameside School Campus.

It was further explained that clarity had been sought with regard to the difference of service provision between local full time officials and school based shop stewards and how the SLA offer aligned to the document 'Advice on Trade Union Facility Time', January 2014, more specifically, page 4, bullet point no 3 under the section headed 'Key Points', which states:

*'All union representatives who receive facility time to represent members employed in schools should spend the majority of their working hours carrying out their main duties as school employees'.*

The important communication link provided by shop stewards, based in schools, was highlighted, with particular regard to:

- generic trade union communications;
- updating of any trade union notice boards on site; and
- publicising of trade union membership to new members of staff.

It was also explained that full-time representatives would be invited to attend meetings of a more strategic approach to represent the schools workforce at a holistic level, with examples including:

- Headteachers' scenario planning meetings;
- Schools Forum; and
- School and Council-led employee consultation meetings, which may be to discuss policy development or academisation (TUPE transfer) matters.

Members noted that it would be rare for a local shop steward to represent a staff member in any individual formal employment matter. They were informed that the purchase of this SLA would ensure the workforce were effectively supported and represented during processes, which staff often find very distressing and challenging. This would enable timeframes to be maintained and clear lines of communication to remain open.

Members were informed that, historically, having local representatives employed within a school and then having a proportion of their timetable set aside for trade union duties covering all Tameside schools became problematic for the employing school leader; trying to balance the employee's trade union activities and competing demands for time, including travelling time, against the employee's normal school business activity. Accordingly, it was decided some years ago to second staff on a full time basis, with the council providing management oversight, thereby, releasing individual schools from having to manage these conflicting demands. It was, therefore, advised that this model of delivery continued to be the best solution for schools.

In contrast, the implications of not de-delegating trade union support were outlined, including potential delays in accessing support, which would negatively impact timely resolutions to workplace issues, progression of employment policies and practices for school leaders. It was also suggested that it would be highly likely that any support available would not have full knowledge and understanding of a school's local needs. Furthermore, any meetings that may require attendance from a variety of trade unions will become more problematic logistically to arrange at a regional level.

Consideration was given to the financial implications of trade union support. It was outlined that, year on year, the number of local trade union officers and associated expenditure is reviewed by the local authority to ensure that the provision continues to deliver excellent services whilst achieving good value for money. The support offered to schools for 2021-22 would be just over 3 full-time officers covering all teaching and non-teaching staff across the whole Tameside area, with it remaining the council's position to seek full cost recovery.

In terms of funding trade union support, the total cost of Service Level Agreements for schools for 2021-22, including staffing costs and associated overhead running costs is £180,890. It was, therefore, calculated that the price per pupil rate for this support would be £7.70 per child. However, it was made clear to members that this was based on the same cost recovery methodology as 2020-21, where 57 out of 98 schools bought into the SLA. It was explained that this created a short fall in cost recovery and this was a position the council could not continue to find itself in, particularly bearing in mind increasing budget pressures, due to the pandemic and the latest medium term financial plan showing a cumulative budget gap of £34m. It was, therefore made clear to Members that the more schools that buy into the SLA, the lower the cost for all schools, with the following scenarios outlined for members and the vote based on scenario D at £6.13 per pupil:

Scenario A	Pupil roll number of 57 schools that bought in 2020-21 (23,500 based on NOR from Oct 19 census)	£7.70 per pupil rate
Scenario B	Pupil roll number of all 98 schools across the borough (35,492 based on NOR from Oct 19 census)	£5.10 per pupil rate
Scenario C	Pupil roll number of <u>all</u> maintained schools (17,927 based on NOR from Oct 19 census)	£10.09 per pupil rate
Scenario D	Pupil roll number of <u>all</u> maintained schools plus Academies that actually bought back 2020-21 (29,506 based on NOR from Oct 19 census)	£6.13 per pupil rate

In conclusion, it was highlighted that non-achievement of full cost recovery would result in the need for a very urgent review of the facilities afforded through the Facilities Agreement, which would most probably result in a significant reduction of the offer made available to schools and the schools workforce for the forthcoming financial year.

Schools' Forum voting members were asked to consider the significant amount of positive, collaborative working the purchase of this SLA would bring to schools, in particular the support it would demonstrate to staff; enabling them access to readily available, local trade union representatives who would be well-knowledgeable with regard to local school-based issues. It was emphasised that school-based staff continue to experience one of their most challenging years and members were advised that ensuring they have access to this provision would demonstrate their commitment to staff and could help to ensure smoother employee relations in matters of change and employment.

With regard to contingency, it was stated that, in 2020-21, secondary maintained schools voted to de-delegate the budget for contingency. This budget had been established to support those schools facing a deficit budget position to support the Dedicated Schools Grant against any future pressures where schools are closing or are forced to convert to an academy, leaving a deficit balance.

Members of the Forum acknowledged that, whilst schools were facing financial pressures, it was prudent to establish a contingency budget to protect future pressures against the Dedicated School Grant, which would affect all schools. It was explained that the aim of this would be to create a contingency fund of approximately £120k (approximately 10% of projected deficit balances).

Members were informed that the de-delegation rate for Contingency for 2021-22 was £5.81 per pupil. Furthermore, it was explained that, should both sectors choose to contribute, based on the October 2020 census data, this would result in the following contribution to Contingency:

- Mainstream Primary Maintained Schools - £67k
- Mainstream Secondary Maintained Schools - £33k

It was noted that, to date, there had been no requests made to access the Contingency Fund of £65k and, therefore, this fund would be carried forward into 2021-22.

In relation to Risk Protection Arrangement (RPA), members noted that RPA had been open to maintained schools since April 2020, whereas, this arrangement had previously only been available to academies. Members were informed that, where schools had previously opted into this arrangement membership would continue. However, should schools choose to opt out, they would need to make their own Risk Protection Arrangements.

The cost of RPA for 2021-22 was identified as £19 per pupil. Members were then notified that DfE was operating a process whereby a deduction is made for the appropriate value, from the local

authorities DSG. It was stated that the local authority planned to treat this in the same way as de-delegation items; allocating to the relevant schools on this basis. It was also noted that nursery numbers are included to calculate the charge for the primary sector (where relevant).

## **RESOLVED**

- (i) That de-delegation of trade union support for Maintained Primary Schools be rejected.**
- (ii) That de-delegation to the Contingency Fund for Maintained Primary Schools be approved**
- (iii) That de-delegation of trade union support for Maintained Secondary Schools be rejected.**
- (iv) That de-delegation to the Contingency Fund for Maintained Secondary Schools be approved**
- (v) That consideration, in principal, of de-delegation of trade union support and Contingency Fund for Maintained Special Schools be deferred to allow for further consideration as special schools are not part of the formal de-delegation process**

## **26 EXCLUSIONS – REDETERMINATION OF BUDGETS**

Consideration was given to a report of the Assistant Director of Finance, the Assistant Director of Education outlining the process for the redetermination of budgets, where pupils have been excluded.

The Schools' Revenue Funding Operational Guidance was outlined for members in relation to where pupils are permanently excluded or who had left mainstream school for reasons other than permanent exclusion and who were receiving education funded by the local authority, such as alternative provisions or a specialist setting.

Members were informed that adjustments to school budgets would be made on a financial year basis and these would include all pupils, regardless of whether they had been included in the census information, and whether the school had received funding for them, in line with the operational guidance, previously outlined. It was also outlined that adjustments for both maintained, mainstream schools and academies would be treated in the same way.

It was discussed that the following pupil led factors would be included in the funding adjustment:

- Basic Entitlement
- Free School Meals (FSM)
- FSM Ever6
- Education as an Additional Language (EAL) (year 3)

It was made clear that these would be transferred between settings and would be the relevant values for both primary and secondary sectors. In addition, it was outlined that Pupil Premium funding would be deducted for any pupils currently eligible for free school means (FSM).

It was proposed that funding was administered on the 'average' per pupil values across Tameside rather than individual schools and an overview of the average funding adjustments, including minimum and maximum deductions for individual schools was provided.

Members were informed that a review of North West authorities' approach was undertaken in September 2019. It was stated that all authorities who had included other pupil-led factors, administered using the 'average' per pupil values, in agreement with Schools' Forum. Therefore, agreement from Forum was sought in order to administer this way in Tameside.

It was explained that the deductions would be pro rata to the number of complete weeks remaining in the current financial year from the 'relevant date' (the only exception being where the exclusion takes place after 1 April and the pupil would normally have left at the end of the school year). Members were also informed that these values would be updated accordingly each financial year.

It was explained that the same allocation basis and cash values for exclusion deductions would be used in the same way to fund admissions of excluded pupils in schools.

**RESOLVED**

**That Members support the approach outlined in the report, in relation to the administration of funding flows**



**27 DATE OF NEXT MEETING**

**RESOLVED**

**That the next meeting of The Schools Forum be held on Tuesday 16 March 2021 at 10am**

**CHAIR**

This page is intentionally left blank

<b>Report to:</b>	<b>SCHOOLS' FORUM</b>
<b>Date:</b>	16 March 2021
<b>Reporting Officer:</b>	Tim Bowman – Assistant Director Education Tom Wilkinson – Assistant Director Finance
<b>Subject:</b>	<b>EARLY YEARS FUNDING 2021-22</b>
<b>Report Summary:</b>	A report on the arrangements concerning the DSG early Years funding for 2021-22.
<b>Recommendations:</b>	<ol style="list-style-type: none"><li>1. Members of the Schools' Forum are requested to note and support the contents of the report.</li><li>2. Members of the Schools' Forum approve the central retention of early years funding.</li></ol>
<b>Corporate Plan:</b>	Education finances significantly support the Starting Well agenda to provide the very best start in life where children are ready to learn and encouraged to thrive and develop, and supports Aspiration and Hope through learning and moving with confidence from childhood to adulthood.
<b>Policy Implications:</b>	In line with financial and policy framework.
<b>Financial Implications:</b> <b>(Authorised by the statutory Section 151 Officer &amp; Chief Finance Officer)</b>	The Dedicated Schools Grant is a ring fenced grant solely for the purposes of schools and pupil related expenditure. This report sets out the allocation basis for all Tameside early years providers for 2021-22
<b>Legal Implications:</b> <b>(Authorised by the Borough Solicitor)</b>	Section 6 of the Childcare Act 2006, introduced statutory duty on local authorities to ensure sufficient childcare to meet demand. Members should be satisfied that the council is complying with this duty, and is sufficiently resourced to meet the identified recommendations as non compliance of any statutory duty means the Council cannot robustly defend and legal/judicial review/ombudsman challenge.
<b>Risk Management:</b>	The correct accounting treatment of the Dedicated Schools Grant is a condition of the grant and procedures exist in budget monitoring and the closure of accounts to ensure that this is achieved. These will be subject to regular review.
<b>Access to Information:</b>	<b>NON-CONFIDENTIAL</b> <b>This report does not contain information which warrants its consideration in the absence of the Press or members of the public.</b>
<b>Background Information:</b>	The background papers relating to this report can be inspected by contacting Christine Mullins – Finance Business Partner, Financial Management, Children's and Safeguarding Services  Telephone: 0161 342 3216  e-mail: christine.mullins@tameside.gov.uk

## 1. INTRODUCTION

- 1.1 This report sets out information on the allocation of the Early Years element of the Dedicated Schools Grant (DSG) for 2021-22.

## 2. EARLY YEARS FUNDING 2021-22

- 2.1 Table 1 provides the current funding settlement for Early Years for 2020-21 and 2021-22. The settlement is based on the Schools, Early Years and Alternative Provision censuses data from January 2020 and will be updated based on January 2021 and January 2022 census data

**Table 1 – Early Years Funding**

Early Years Funding Streams	2020-21 Early Years Allocation	2021-22 Provisional Early Years Allocation	Increase in Funding
	£	£	£
3 & 4 Year Old Universal Entitlement	9,692,529	9,819,228	126,699
3 & 4 Year Old Extended Entitlement	4,501,240	4,560,080	58,840
2 Year Old	2,863,009	2,905,582	42,573
Early Years Pupil Premium (EYPP)	135,804	135,804	0
Disability Access Fund (DAF)	68,880	73,185	4,305
<b>Total</b>	<b>17,261,462</b>	<b>17,493,879</b>	<b>232,417</b>

- 2.2 A consultation was launched for the period 25 February until 11 March to gather opinions on the proposals set out below. At the time of writing this report, the response to the consultation was not available.

## 3. 3 & 4 YEAR OLD FUNDING

- 3.1 The hourly rate of funding received by the LA has increased from £4.59 in 2020-21 to £4.65 2021-22 for both universal and extended entitlement.
- 3.2 The local funding scheme must include a base rate that applies to all children in all settings. There is a mandatory requirement to have a supplementary rate in relation to Deprivation and it is also possible to have other supplements in relation to Rurality/Sparsity, Flexibility, Quality and English as an Additional Language. The total value of these supplements cannot exceed 10% of the overall funding within this block.
- 3.3 The funding scheme for 2020-21 contains one supplementary element, which is in relation to Deprivation, and it is proposed that this continues to be the only supplement in 2021-22. The bands of deprivation that each provider is allocated to are calculated with reference to each individual child's score on the DFE maintained Index of Deprivation Affecting Children (IDACI). These scores are used to create an average score per provider and then each provider is ranked into one of three bands. It is proposed to keep the 3 bandings used previously.
- 3.4 The current and proposed rates of allocation to providers are included in Table 2.



**Table 2 – 3 & 4 Year Old Rates to Providers**

<b>Breakdown of Rates</b>	<b>2020-21 £ per hour</b>	<b>Proposed 2021-22 £ per hour</b>
Base	4.20	4.25
Deprivation – Band A	0.05	0.05
Deprivation – Band B	0.10	0.10
Deprivation – Band C	0.15	0.15

- 3.5 There continues to be a mandatory requirement for a SEN Inclusion Fund. The allocation for this in 2020-21 is £0.180m and we are proposing to increase this to approximately £0.216m using the remaining increase on the hourly rate. Demand on the fund in 2020-21 remains similar to 2019-20 where there was an overspend against the fund. The allocations will continue to be agreed through the Early Years Panel.
- 3.6 The operational guidance has confirmed that LAs must ensure that at least 95% of the funding in relation to 3 and 4 year olds is passed through to providers in 2021-22. The proposed rates, together with the SEN Inclusion Fund means the LA will be compliant with the legislation and the central retention based on the current settlement will be approximately £0.71m.
- 3.7 The centrally retained funding will support:
- Early Education Funding Team – This fully supports the administration of Early Years funding, the annual costs associated with the Servelec IT system which is used to calculate and process the payments to Schools and Private, Voluntary and Independent providers.
  - Family Information Services – This supports an Information Officer. This post provides advice, guidance and information to families wishing to access Children’s services and was implemented to support the increased demands from the early years extended provision.
  - Early Years Quality Improvement Team – This supports 4 Quality Officers and 2 SENCOs. Support is primarily in relation to: signposting and promoting the standard 15 hours offer and extended 30 hours offer; OFSTED regulations and standards; and Special Educational Needs and Disabilities related issues.
  - SEN Team – funding support for an Early Years SEN Caseworker as specific support for SEN in early years.
  - Social Emotional and Mental Health Service – funding support for an Early Years Co-ordinator as specific support in early years.
  - Sensory Support – funding support for a Hearing Impaired Teacher as specific support for Early Years.
  - Making it REAL (Raising Early Achievement in Literacy). This is aimed at supporting practitioners to build parents’ knowledge and confidence so that they can help their children with reading and writing and create a positive early home learning environment. This programme is evidence-based, has been very successful in Oldham at raising GLD and we are currently running a trial and test cohort in eight primary schools in Tameside. The funding will be used to bring PVIs and more school nurseries on board with Making it REAL.

#### **4. 2 YEAR OLD FUNDING**

- 4.1 The hourly rate of funding received by the LA has increased from £5.38 in 2020-21 to £5.46 2021-22.
- 4.2 In 2020-21, the provider hourly rate allocated is £5.24 and £0.13 per hour is retained centrally. It is proposed that the hourly rate to providers is increased to £5.30, and £0.13 per

hour remains to be retained centrally. The centrally retained funds contribute to work outlined in 3.7.

- 4.3 In addition, it is proposed to increase the SEN Inclusion Fund of £5,000 to approximately £16,000 due to demand on the fund.



## **5. EARLY YEARS PUPIL PREMIUM (EYPP) AND DISABILITY ACCESS FUND (DAF)**

- 5.1 There are no proposed changes for funding allocated to providers for 2021-22 for EYPP. The allocations to individual providers will continue to be based on a maximum eligibility of 38 weeks per year, 15 hours per week and an hourly rate of £0.53.
- 5.2 There are no proposed changes for funding allocated to providers for 2021-22 for DAF. The allocation rate for eligible children is £615 per child.

## **6. RECOMMENDATIONS**

- 6.1 As set out at the front of the report.

# Agenda Item 5

<b>Report to:</b>	<b>SCHOOLS' FORUM</b>
<b>Date:</b>	16 March 2021
<b>Reporting Officer:</b>	Tom Wilkinson – Assistant Director, Finance Tim Bowman – Assistant Director, Education
<b>Subject:</b>	<b>SCHOOLS' FORUM FORWARD PLAN 2021/22</b>
<b>Report Summary:</b>	Provide members of Schools Forum the Forward Plan of reports and meeting deadlines for the Financial Year 2021/22.
<b>Recommendations:</b>	Members of the Schools Forum are requested to vote on the following <ul style="list-style-type: none"><li>• Approve the proposed meeting dates set out for 2021/22.</li><li>• Decide if it is appropriate to carry out a review of Schools' Forum during 2021/22.</li></ul>
<b>Corporate Plan:</b>	The Schools' Forum decision-making, supports the Corporate Plan by supporting best use of resources to ensure children have the very best start in life, ensuring children are ready to learn and encouraged to thrive and develop.
<b>Policy Implications:</b>	Overall effective use of resources across Tameside schools is a key component in the Authority's Annual Use of Resources Statement.
<b>Financial Implications:</b> (Authorised by the statutory Section 151 Officer & Chief Finance Officer)	There are no direct financial implications as a result of this report. However, an effective Schools' Forum supports good stewardship and good use of resources.
<b>Legal Implications:</b> (Authorised by the Borough Solicitor)	Effective governance requires effective planning.
<b>Risk Management:</b>	There are no direct risk management implications as a result of this report.
<b>Access to Information:</b>	<b>NON-CONFIDENTIAL</b> <b>This report does not contain information, which warrants its consideration in the absence of the Press or members of the public.</b>
<b>Background Information:</b>	The background papers relating to this report can be inspected by contacting Christine Mullins  Telephone: 0161 342 3216  e-mail: christine.mullins@tameside.gov.uk

## 1. INTRODUCTION

- 1.1 This report outlines the timetable and schedule of meetings and reports to be presented for the upcoming year, forming a forward plan. The plan will enable Forum Members to be kept informed of items to be tabled for consideration.
- 1.2 The meeting dates for the remainder of 2021/22 financial year for forum have now been set and are proposed as outlined below. Setting the annual schedule of dates in advance assists Forum Members with diary planning.

Tuesday 22 June 2021  
 Tuesday 28 September 2021  
 Tuesday 23 November 2021  
**Thursday 13 January 2022**

- 1.3 Schools' Forum meetings have moved on-line since the first lockdown and have been held via zoom during 2020/21. Legislation is in place to allow remote meetings of Schools' Forum until 31 March 2021. Members will be updated in relation to any changes to these regulations, should these be extended. Subject to availability, physical meeting spaces will be identified, when government guidelines allow this
- 1.4 Please note, the January meeting is proposed to remain on a Thursday, as per 2020/21. This is to enable the maximum amount of time from the funding announcements, which are expected Christmas week to be worked into a final plan for Forum's consideration. This will enable us to meet the DFE deadlines for the APT submission, which is usually 19 January, with the appropriate political ratification.

## 2. FORWARD PLAN

- 2.1 The table below summarises the forward plan of reports to be considered at each meeting by Schools Forum.

Forum Meeting	Report	Purpose
June	DSG Outturn 2020/21 and 2021/22 Update	Noting
	Scheme of Financing for Schools	Noting/Approval
	High Needs Update	Noting/Approval
September	Forum Membership	Approval
	Schools Balances Reports 2020/21	Noting
	Schools Financial Values Standard Returns	Noting
	School Funding Update on NFF and Summer Announcements from DFE	Noting
	Consultation of Funding Formula (Schools Block)	Noting
	DSG Monitoring 2021/22 Update	Noting
	Deficit Recovery Plan Update	Noting
November	DSG Monitoring 2021/22 Update	Update
	Outcome of consultation of Funding Formula (Schools Block)	Noting
January	DSG Monitoring 2021/22 Update	Noting
	Formula Funding 2022/23	Approval
	Schools Forum Forward Plan	Noting

2.2 Further reports may be added to the agenda, where Schools' Forum involvement is necessary throughout the year.

2.3 The DfE recommends periodic review of the effectiveness of Schools Forum, and provides a self-assessment tool to support this review, which can be found at the link below. Schools forum are asked to consider if this is something they would like to be built into the work plan for 2021/22.

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/647443/Schools\\_forum\\_self-assessment\\_toolkit.odt](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/647443/Schools_forum_self-assessment_toolkit.odt)

### **3. CONCLUSION**

3.1 A forward plan has been outlined for Schools Forum Members to assist the smooth running of the decision-making process, with options to consider the best method for future meetings. Schools' Forum are also asked to consider whether or not a review of the Forum should take place to identify any areas of strength or weaknesses of the Forum.

### **4. RECOMMENDATIONS**

4.1 As set out at the front of the report.

This page is intentionally left blank