

## **SCHOOLS' FORUM SCHOOL BUDGETS WORKING GROUP AND HIGH NEEDS WORKING GROUP – COMBINED MEETING**

**DRAFT Notes of the Combined Meeting of the School Budgets Working Group and the High Needs Group held via Microsoft Teams on 20 May 2022, 9.30am.**

**Present:** Lisa Balderstone (PRUs), David Grimshaw (North Maintained Primary), Huw Davies (Primary Academy), Tom Hailwood (West Secondary Academy), Matt Hardwick (South Maintained Secondary), Chris McAree (North Secondary Academy), David Nattrass (North Maintained Primary), Jennifer Rowlands (West Maintained Secondary) Alan Rutter (Teachers' Associations and Forum Chair), and Chair, High Needs), Charlotte Tudway (CE Diocese) Susan Milburn (LA), Amanda Chew (LA), Sally Senejko (LA), Nicola Shiels (LA)

**Apologies:** Richard Aindow (Special School Academies), Rachel Field (West Maintained Primary), Daniel Hinton (Special Schools), Ian Nicol (South Maintained Primary), Cllr Sue Sanderson (Lead Member – Schools & Learning), Cathy Styles (South Maintained Primary), Ruth Webster (South Maintained Primary), Kris Williams (North Secondary Academy)

### **1. Exclusion of Press and Public**

It was agreed that all items would be considered in the public domain.

### **2. Declarations of Interest**

None.

### **3. Notes of Previous Meeting**

The notes of the combined meeting of the School Budgets and SEN Working Groups held on 9 February 2021 were agreed as an accurate record.

### **4. SEN Transitional Protection Modelling**

The Schools Forum combined SEN and Budget Working Groups received a report updating on the modelling that had been undertaken on the SEN Transitional Protection funding so that those more inclusive schools with higher levels of EHCPs could continue to be supported beyond 31 March 2023 when the current SEN transitional protection funding ended.

The group were asked to consider and feedback on the modelled options and make a recommendation to the full Schools Forum on the option to be implemented in 2023/24.

At the meeting of the combined SEN and Budget working group held on 9 February 2022 a number of options to address the impact of the removal of Targeted SEN funding on those schools with high levels of inclusivity were considered and put forward for potential modelling.

Since the February meeting, the government's SEND and AP green paper had been published and was out for consultation with a closing date of 22 July 2022. The green paper included a number of proposals which impacted on the proposed modelling work such as a national standardised calculation of the notional SEN budget, planned

review of the current notional SEN threshold value of £6,000 and a national banding system. Whilst there were no confirmed dates for when the proposed changes would be implemented it was expected that local flexibility within the funding system would be limited going forward. It was, therefore, recommended to the group that consideration was given to extending the current SEN transitional protection funding rather than implementing a new local SEN funding system.

Schools Forum had agreed that funding for 2022-23 would be allocated on the basis that no school would be any worse-off following the restoration of the notional SEN threshold to £6,000 and the removal of the Targeted SEN funding which came into effect from 1 September 2021. Where schools were worse-off full transitional protection had been provided to restore them to their original position; 103 schools had received transitional protection in 2022-23 totalling £0.777m. This represented 34% of all mainstream schools/academies.

Three models for extending the SEN transitional protection beyond 31 March 2023 into 2023-24 were considered:

- Model 1 – proposed that that the level of protection was reduced to 50% in 2023-24. Under this scenario indicative modelling showed that 103 schools/academies would continue to attract the protection funding at a cost of £0.389m.
- Model 2 – proposed that schools that had **more than 6%** of their total pupils (Reception to Year 11) with EHCPs would receive full protection funding. Under this scenario indicative modelling showed that 42 (14%) schools would attract the protection funding at a cost of £0.460m. This conformed to the current DfE guidance that said that additional SEN funding should only be targeted at a minority of schools which have particular challenges because of their disproportionate number of pupils with SEND or high needs.
- Model 3 – proposed that schools that had **more than 8%** of EHCPs would receive full protection and those with **over 4% up to 8%** would receive 50% protection. Those below 4% would not receive transitional protection. Under this scenario 82 (27%) of schools would attract protection funding at a cost of £0.500m.

Other options could be suggested for potential modelling.

It was noted that the indicative figures had been modelled against 2022-23 actual funding allocations and pupil numbers to show a like for like comparison between the current transitional protection funding and the modelled funding. Actual allocations for 2023-24 would be dependent on the proportion of pupils with EHCPs and value of EHCP top-ups at each individual school as calculated at the time.

The group was generally supportive of model 2 as it gave more protection to those schools with the highest proportion of EHCPs.

The Schools Forum combined SEN and Budget Working Group noted the report and recommended that Schools Forum should implement Model 2 (schools that have more than 6% of their total pupils (Reception to Year 11) with EHCPs would receive full protection funding) in 2023/24.

**5. LA Loan Policy for Maintained Schools – Verbal Update**

In January Schools Forum had agreed revisions to the LA Scheme for Financing Schools, including a form of loan arrangement that did not operate by way of a licenced deficit but assisted schools in spreading the cost over more than one year of large one-off individual items of a capital nature.

The loan arrangement did not apply to any school in deficit and there had been some feedback suggesting that this was excluding some schools from the scheme. The group was asked to give a view about consulting with schools on an amendment that would enable schools with a deficit budget to make a request under the loan arrangement.

The consensus view from the group was that it would not be appropriate to consult on a change to the LA loan policy for maintained schools to include schools with a deficit budget.

An update report, including the views from the Combined Schools Budgets and SEN working groups would be presented to the next meeting of the Schools Forum on 8 June.

**6. Date of Next Meeting**

The next scheduled date for meetings of the working groups was Wednesday, 21 September 2022. The meeting would begin and 9.30am and details of venue/Microsoft Teams would be confirmed closer to the date.

**7. Any Other Business**

Charlotte Tudway, CE Diocese and Tom Hailwood, West Maintained Secondary, were welcomed to their first meeting.

E&S/NS  
May 2022