

SCHOOLS MANAGEMENT FORUM

NOTES OF MEETING HELD ON WEDNESDAY 7TH NOVEMBER 2018, 8:15AM AT COMMUNITY LEARNING CENTRE

PRESENT:

Andrea Crawshaw (Chair)	-	AGS
Mark Coates	-	Middlesbrough Council
Afzal Khushi	-	PVI
William Guthrie	-	PVI
Judith Walls	-	Middlesbrough Council
Helen Steele	-	Caldicotes School
Julia Rodwell	-	Park End Primary
Sarah Lymer	-	Linthorpe Primary
John Lees	-	Governor
Chris Wain	-	Pallister Park
Jane Steel	-	Middlesbrough College
Joanne Smith	-	Beverley School
Andrea Williams	-	Middlesbrough Council
Lindsey Thompson	-	Middlesbrough Council
Caroline Cannon	-	Middlesbrough Council
Trevor Dunn	-	Middlesbrough Council
David Dawes	-	Kings Academy
Helen Malbon	-	Viewley Hill
Jackie Walsh	-	Green Lane
Beverley Hewitt-Best	-	Newham Bridge
Anita Jeffries	-	Archibald Primary
Nicola Russell	-	Observer
Vanessa Lazenby	-	Observer
Sean Hogg	-	Observer
Samantha Corbyn	-	Middlesbrough Council

1. **Apologies for Absence**

Angela Robson, Janice Brunton Dobson, Sheila Marley, Christina Jones, Andrew Humble, Gemma Simon

2. **Any Items for AOB**

Timing of paper distribution – The relevant papers for forums should be distributed further in advance.

Voting rights are to be included in future distribution.

3. **Minutes of Previous Meeting/Matters Arising**

Concerns were raised in regards to the timeliness of report distribution. Although time management sits currently with Mark Coates, due to his departure from his current role this responsibility

will transfer to Andrew Humble for the time being until a replacement is appointed.

Amendments were requested in regards to the attendance list of the last minutes, SC will action this and redistribute.

4. **Decision/Action Log**

Members of SMF asked for an up-date on the Outstanding Debt for Alternative Provision for Permanent Exclusions and Intervention Places

Mark Coates had been working with Middlesbrough Council's Legal Services and Middlesbrough Schools and was awaiting feedback from one of the schools concerned. A repayment agreement had been drawn up with another school and there was a small number of schools where agreement had still to be reached. The estimated total for invoices outstanding relating to prior to April 2018 amounted to approximately £280,000.

There was debt outstanding relating to invoices that had only been raised in September 2018 but related to the 2017-2018 financial year

Members of SMF asked for a report on the up-to-date position on debt outstanding for the next meeting.

AH is aware of outstanding balances and will discuss recovery of funds with AW.

5. **SMF Constitution**

JL has joined as governor representative.

Vacant Primary Positions:

- Anita Jeffries and Sarah Lymer have occupied 2 positions.
- Emma Watson has expressed interest in the last open position.

AC will continue to represent the Secondary Academy Position.

MC will vacate the SMF as on Friday 9th November 2018. His position will be presented to the Council's Leadership Management Team on 8th November 2018 and will be advertised week commencing 12th November 2018. AH will attend in his absence and Faye Revely will attend the next 2 forums and contribute to the new formula.

AC will continue to chair School's Management Forum.

HM will fill the position of Vice Chair.

6. High Needs Budget/Task Group Update

JCW took the Group through the HNB Report. The report set out

- an update on the High Needs Block Budget for 2018-2019
- the overall projected financial position as at 31st March 2019 and what steps need to be taken to bring the budget back into a balanced position.
- To consider the proposed changes required to individual budgets to implement the HNBB recovery strategy

Paragraph 2 provided the background to the High Needs Block Budget financial position

Paragraph 3 gave details of the projected budget outturn position for the 2018-2019 financial year for the HNBB as at 30th September 2018. The SEN and AP Budget Managers had raised concern that although the budget was currently projecting a small under-spending there were a number of SEN complex cases that still needed to be addressed and an increasing number of exclusions in the autumn term which would impact on the outturn budget.

Paragraph 4 set out the steps to be taken to adopt the budget strategy to bring the budget back into a balance position by April 2022.

The Director is working with schools to develop a revised strategy for Inclusion that will be implemented across the LA.

The Appendices to the reports sets out details of the proposed recurring savings to be made to the HNBB amounting to £1,749,600,

The non-recurring transfers to be made from the Schools Block to the HNBB over three years if approved by the Secretary of State for Education amounting to £3,006,717.

The current non-recurring savings that will need to be made to the HNBB of £879,742

Members of SMF asked the following questions or made the following comments:-

- The report presented today is a draft version. The purpose of the report is to communicate the financial plan for the following year including non-recurring and recurring savings.

- The overspending on Fees to Independent Special Schools includes placements for Looked After Children that are placed out of area in Independent Special Schools. The LA's strategy is to bring out of area children back into to the Local Authority if there is suitable provision and the 2nd is to ensure that there is a fair split of expenditure between agencies involved.
- IK discussed some special school spaces being absorbed into the PVI sector however this would not be appropriate given the complexity of some children's situations. Mainstream schools do not have the capacity, facilities or expertise to accommodate children with certain needs.
- Moving forward children at risk of permanent exclusion will be referred to AW to seek further support within or external to the local authority. In the last academic year there were a total of 48 permanent exclusions, there have already been 5 by mid-way through the first half of the autumn term 2018.

Points Raised:

- Concerns were raised that this may undermine the decisions of Head Teachers – AW assured that referrals would be picked up within the working day that they are submitted.
- There is a substantial amount of paperwork involved in executing a permanent exclusion and the process can sometimes take 3/4 weeks.
- AW agreed that the Local Authority can attend permanent exclusion meetings to facilitate the above process.

Action is needed to bring the high needs block into balance and this is most appropriately achieved through an agreed recovery plan:

- Proposed recovery plan would be over 3 years.
- The LA proposes to seek approval from the Secretary of State to transfer funding from the Schools block to the high needs block for 2019/20, 2020/21 and 2021/22.
- 1% of the school budget would be transferred.
- A regional meeting attended by AW supports the transfer of funds however the total percentage to be transferred is to be decided by individual Local Authorities.

There are concerns that the most vulnerable children will be impacted and that the percentage drop in school budgets will not have been planned for at present.

AC stated all involved organisations need to be encouraged to lobby government about the need to allocate additional funding to support

SEN as opposed to believing schools had enough money and if it was managed better it could go further. This is not the case.

If the actual net expenditure is lower than anticipated during 2018/19 then it will reduce the level of non-recurring savings required to be made from the High Needs Block Budget over the course of the next three years

Concerns were raised again about the position on Alternative Provision invoices sent to schools for their contribution towards Permanent Exclusions and Intervention Placements.

AC raised the point that she had received an invoice for children that no longer attended her school.

A revised system for the school contributions had now been put into place having sought the support of SMF to the revised charging arrangements in November 2017.

Proposed High Needs Block Budget Recovery Plan is set out in Appendix 4 having worked through all the budgets within the High Needs block with both budget managers and the education representatives on the sub group of the SMF.

The LA has developed a Strategic Plan for SEND which together with the Inclusion Strategy will form the first part of the Strategy in moving forward with the HNBB Recovery Plan.

There is a need for extra provision around autism and this will be achieved through the careful management of high need places. An annual review of high needs places will continue to be undertaken jointly between education providers SEN officers and representatives from other local authorities. Where there is insufficient evidence to support the continuation of commissioning places the number will be reduced where there is evidence that more places are required that additional places will be commissioned. These arrangements have been reflected in the places notified to the EFA for the 2019-2020 academic year.

Mainstream Element 3 Top-Up funding :

The Pre-16 SEN Matrix will see a reduction over the course of the next three years which will be determined by the number of claims and the levels of support requested.

The Post 16 SEN Matrix will be aligned to the Element 1 and Element 2 funding which provides support for up to 600 guided learning hours. If additional support is required for young people then it may be appropriate to seek support for Adult Social Care.

Element 3 Top-up funding for specialist provision in both Special School and Resource Provision will be reduced over the course of the next three years

Colleagues have raised the issue of Middlesbrough young people attending specialist provision outside of the Local Authority and would expect to see a similar reduction in payments made to OLA specialist provision.

In implementing the revised LA strategy for Looked After children and reviewing the responsibility for payment of these placements it is proposed that savings will be achieved in the Independent and non-maintained Schools budget with effect from 2020.

The number of exceptional SEN places commissioned currently from RTMAT should reduce by September 2019.

SEND Support Services, HI and VI Services there will be a shift towards 1 head of service which will also incur savings.

Savings are proposed in all areas of support services through natural wastage of reviews that are to be undertaken by the wider local authority.

Home and Hospital places – the number of places are not initially going to be reduced however having sought clarification from the DfE it is proposed that due to the fact that pupils are on dual placements, so schools are continuing to receive funding Schools will contribute towards the cost of a placement. Revised guidance will be sent out to all schools.

At present there are 96 places commissioned for alternate provision with the implementation of the inclusion Strategy it is not proposed to reduce the number of places until September 2020 when it is proposed to reduce the number of places by 5 with a further reduction the following year. These will be a combination of both primary and secondary places.

CW raised concerns about the volume of children with complex needs presenting in schools. As schools become more inclusive and employ other routes in supporting young people and their families alternative provision will be reduced. Middlesbrough has a very specific set of needs that would struggle without special allocation.

Other areas of AP Provision where reductions have been proposed are: - the number of days offered to young people will be reduced from 3 to 2.5 days for intervention placements, using the Community Learning Centre for curriculum needs instead of office

space. Introduce charges for training which will be consistent with approaches adopted elsewhere within the department.

Savings may slightly exceed some targets which can contribute to the non-recurring savings deficit. A date will be arranged for savings to be presented to all stake holders for comment.

Once the proposals have received support from members of SMF Consultation meetings will be arranged with discuss the background to the proposals and seek the views of all education providers.

DD noted that a reduction in funding does not necessarily mean a reduction in quality. However it was paramount that regular monitoring and reporting was put into place to ensure that targets were achieved and correction action taken where necessary. This needed to involve stakeholders To ensure that at the same time as ensuring the savings were achieved there was a need to ensure efficiency, quality and improvement of standards.

Who would undertake the role of monitoring the proposed recovery plan? The LA had agreed to make an appointment at Director Level to ensure the LA's savings targets are achieved this role would be assisted by the SEND Resource Manager who will hopefully soon be appointed.

Following discussion with senior colleagues it was also proposed to send a letter from the Chair of the School Management Forum, the Executive Member and the Executive Director for Children's Services with the application to dis-apply the regulations for the 2019-2020 financial year in support of the application but to stress the need to review the funding available for SEND at national level.

The recommendations of the High Needs Block Budget Report agenda item are to:

- **Note budget monitoring position for the 2018-2019 financial year as at 30th September 2018.**
- **To note the split of the recurring savings required in the High Needs Block Budget as approved by the Director of Education on 23rd October 2018 and set out in APPENDIX 2**
- **To support the financial recovery plan split between recurring savings and non re-curring savings over the course of the next three years as set out in APPENDIX 3 noting however that the non-recurring savings required is a fluid figure with plans having to be adjusted to accordingly.**

- To support the proposed adjustments to budgets within the High Needs Block Budget to achieve both the recurring and non-recurring savings as set out in APPENDIX 4 to this report.
- To note the next steps and the need to submit an application to the Secretary of State for Education by 30th November 2018

The above recommendations were noted and supported by members of the SMF.

7. Virtual School/LAC Pupil Premium Update

The current arrangement in regards to the Pupil Premium is as follows:

- The Local Authority retain £850.
- The school attended by the Looked After Child receives £1,350.

This funding covers a variety services required by the child including extra in class support. Moving forward funding will change depending on the complexity of individual cases to provide a more bespoke service.

The Virtual School was considerably overspent – resulting in a restructure and attempt to return balance to the budget. Some posts will be removed and staff will be paid differently. Schools will feel the benefit of changes with a more efficient and flexible service.

The future arrangements in regards to the Pupil Premium is as follows:

- The Local authority will devolve £1000 per LAC
- The restructure of the Virtual School will reduce staffing costs however further reduction would diminish the quality of service beyond what would be acceptable.

Concerns raised in regards to above proposal:

- The arrangement will have greatest financial impact on those schools with the highest numbers of LAC
- Middlesbrough LA devolves less than the average amount compared to neighbouring Authorities.

Although the Virtual Head does not require SMF approval, the forum did not agree to support the above proposal and requested that a clarification of the proposal is presented at the next meeting.

8. **SALT Contract Update**

The Joint Commissioning Strategy is to be moved forward between Redcar and Cleveland, Middlesbrough Council and the CCG.

The following points were raised during consultation:

- The majority of SENCO's across the area of Redcar and Cleveland and Middlesbrough expressed that the service is helpful but also identified a training need.
- There are currently 3 different contracts displaying 3 different specifications under 1 provider.
- CCG contributes more and supports other contracts.
- Under a joint commission their input would continue with streamlined processes and improved assessments provided a more bespoke service.

It was raised that as well as the above points that Health Visitors have a substantial role to play in improving speech and language through educating families about the use of dummies and iPads and other electronic devices. Improvements will not be made immediately and will span a length of time.

The Forum agreed to the proposal presented to the meeting and requested that Joint Commissioning Reports are displayed to the meeting on a regular basis.

9. **AOB**

Mark Coates was acknowledged for his contributions to the SMF and congratulated on his new post.

10. **Date of next meeting 8.15 am, Wednesday 19TH December 2018, Venue: Community Learning Centre**