

Formula Review Meeting – High Needs

Minutes

Friday 27th November 2020

Microsoft Teams Meeting

Present:	Jo Briggs (Acting Chair)	Primary Head Teacher
	Dominic McKeon	Secondary Head Teacher
	Alex Devaney	Secondary Head Teacher
	Stephen Gribbon	Secondary Head Teacher
	Claire Whalley	Primary Head Teacher
	Julie Cheung	Primary Head Teacher
	Susan Tailor	Special Head Teacher
	Joan Saunders	Primary Business Manager
	Patti Jones	Secondary Governor
	Dave Bevitt	Primary Governor
	Lisa Butcher	Head of Finance
	Julie Edwards	Schools Finance Manager
	Helen Joseph	Schools Finance Officer

In attendance: Berni Brown, Wendy Fairman and Sue Cornwell (part)

Apologies: Apologies were received from Adeel Sahi and Matthew Wilkinson

1. Welcome

LB welcomed new members Alex Devaney and Stephen Gribbon. As the position is currently vacant Jo Briggs agreed to chair the meeting.

2. Declaration of Interests

Declarations of interest were received from ST (representing special schools and BASS) and DM (Trustee of BIT)

3. Introduction

LB explained that the slides to be presented were confidential and a briefer version will be presented at the head teacher briefing on Tuesday 1st December. Aims to be open and transparent and demonstrate what is happening from a budget point of view and then discuss plans to move forward. DM mentioned that a 'layman's' presentation to head teachers showing the impact to primary and secondary schools could take place after the briefing so they are fully informed for the consultation. JE replied that the impact is the same on both secondary and primary and the difference is dependent on levels of additional need and deprivation in each school. LB added that due to the nature of the webinar this wouldn't be possible but a list of contacts of the Group in the presentation could be included for anyone to ask questions.

Action: - LB/JE to add contact list to presentation slides.

4. High Needs Slides

JE presented the slides to the group:-

- 1 Changes in Budget Available** – this shows the history of the High Needs block funding from 2017-18 showing the different elements, increases in DSG, adjustments by ESFA, and contributions from schools block. DM asked if the transfer from Schools Block to High Needs affected the AWPU, JE replied that it depended on various factors e.g. protection and can look at it in a future meeting.
- 2 Budget Position Qtr 2** – despite the increase in funding demand is also increasing and therefore deficit is growing and projected to be £16.2m at end of 2020-21. PJ asked if spend to date could get higher, JE confirmed it probably would. DM enquired whether it was a conservative estimate and JE confirmed that it included everything that was known at this time but not any additional EHCP's from now until the end of the year. The group felt it would be useful to show forecasts with low/middle/high rates of growth so schools could see why Schools Block transfer was required. DM stated that it would be useful to show schools the impact of executing/not executing a plan on the figures. PJ felt that including potential growth would give the impression of better management of the budget. JE replied that an analysis of the changes could be brought to future meetings. DM agreed that this will help to pinpoint any issues. ST added that it is hard to reflect the ever-increasing demand on high needs.

Action – JE/LB to include estimated growth to year end and impact of any plans in future information.

- 3 Summary of Expenditure** – shows the split between expenditure with the top block linked to individual children and the other block showing support services provided in Bolton. ST pointed out that the 19-20 decrease in Support Service (Ladywood) was due to savings made by introducing a traded service. (SC left the meeting).
- 4 2020-21 Average Cost of Placements** – where children are placed and the average cost per placement. DM asked that rather than move the 0.5% to High Needs block why not leave in schools and increase their funding to tackle any issues. JE replied that it would not necessarily be distributed to the schools receiving support from the High Needs Block. LB suggested that this could be overcome by remaining in the High Needs block and would allow to be more creative and target children e.g. inclusivity package. DM agreed the ringfencing of the funding would make it clearer for schools to see the impact of the funding. JB mentioned that the infrastructure isn't in place in primary schools to access funding in this scenario. BB responded that part of the intention of setting up the consultation group around inclusion was to address how that infrastructure might be put in place and work towards it in the next academic year. SG put forward an idea of ring-fencing the other £5.4 m spent in mainstream schools and giving ownership of the funding to schools with a cap put in place. JE reminded the group that the Schools Block transfer is time limited due to the future full implementation of the national funding formula so some thought would have to be given on how this would be funded in the future and whether schools would contribute.

Action:- JE to provide a breakdown of mainstream places (883) – primary/secondary/average amount per child

- 5 **Pupil Numbers** – shows the change in numbers per category. DM commented that the AP figure would be skewed by the impact of Covid and that the trend is rising.

Action: JE to amend estimates AP numbers to 250 in 2020-21 in future slides.

- 6 **EHCP and SEN Support** – illustrates breakdown of types of EHCP and SEN support and show type of need and how it has increased over the years.

Action: JE to provide EHCP/SEN support breakdown and list showing full name of each category.

- 7 **EHCP Increases** – shows a large increase in EHCP's since 2019. JC commented that criteria is different now to 2014 so numbers would be even higher if original criteria had been used. LB suggested that through the Inclusion and Engagement group Gill Murphy could provide details of how the criteria have changed to provide some clarity on what has changed and why. BB responded that what needs to be understood through the Inclusion and Engagement group is what is happening, the scale of the need and how best to target that need in a more inclusive way through the schools. Parents nationally are clearer on what entitlement is e.g. out of borough placements. Work to be done in next 12 months on developing a clearer understanding of the cohorts of children. DB expressed that there is frustration at the length of time taken in the EHCP process. BB responded that one of the issues is the scale of the increase and the team that supports the assessments has not increased by the same level. The LA is looking at the size and scale of the team and how best to assess, progress and review the applications. DM commented that supporting the primary schools would reduce the problem of children entering high school without adequate support. JB agreed that the health services should be involved to identify children at two year old assessment. BB suggested that it be taken to Children and Young People's Partnership. Before finances are looked at, the infrastructure in schools also needs to be examined and discussed in joined up meeting with Inclusion and Engagement group with services that schools might need and commissioning. The process needs to start soon with some 'here and now' actions and some longer term ambition.

Action: JE/LB – Ask Gill Murphy/Sue Cornwell to provide EHCP criteria change

Action: JE/LB - Include infrastructure of £1m ringfence in future slides

Action: JE/LB - EHCP and age profiles to target EY

- 8 **Increase in Special School Places** – per school from 2016 to 2020 shows a large increase in cost each year. ST informed the group that Ladywood have increased by a further 23 places to avoid out of borough placements and pressure is increasing on special schools.
- 9 **Resource Provisions** – in addition to the provisions listed, JE updated the group that Moorgate was a new provision due to open and Rivington and Blackrod is increasing by 5 places each year.

Action: JE/LB – look at pupil numbers incl. Moorgate

- 10 **Number of Exclusions** – shows an increase in number from 66 in 2017-18 to 130 in 2019-20. JB said some primary schools have suggested that the number will continue to rise now that the change to alternative provision (AP) charges has been made. DM commented that the root cause of exclusions should be investigated and whether EHCP's could have benefited these students. Current curriculum doesn't benefit all students and increase their

life chances whereas the different curriculum provided in AP can benefit these children and give them opportunities. BB responded that the review of secondary has found in some cases that the curriculum hasn't been robust enough in AP and requires refinement. Would welcome a conversation with the Primary Exec head teachers in relation to the funding of a primary AP. JB agreed this would be a good idea.

Action: LB/JE provide data on reasons for exclusions

Action: JB to arrange meeting with BB and Primary Exec.

11 Data Trends – shows comparison of increase in pupil population compared to High Needs expenditure.

12-13 Action Plans – items achieved to date and in progress.

14 Forward Plan – shows contribution to schools removed from 2022-23 assuming NFF in place and therefore no top-slice. Assumed national increases and demand growth of 100 extra children. Deficit continues in future and could be worse than forecast if demand is higher.

15 Next Steps – for Funding and Provision/Demand including restarting of DfE SEND review.

JB commented that it had been a productive meeting and agreed with DM that a list of pros and cons be provided to schools for the transfer of the funding.

Action: DM to send a slide to the group to be agreed and inserted into consultation.

5. Date of Next Meeting

Thursday 17th December at 8.30am

MS Teams