

# Islington Schools Forum

Minutes of the meeting held on Thursday 15 July 2021 at 2pm – held virtually (MS Teams).

## PRESENT

### Forum Members

Abi Misselbrook-Lovejoy (AM-L)	Head teacher, Newington Green Primary School (Chair)
Alan Streeter (AS)	Head teacher, Beacon Height Secondary School (Islington Futures Federation)
Jenny Lewis (JL)	Head teacher, Thornhill Primary School
Coleen Marshall (CMa)	14 to 19s partnership - City & Islington Sixth Form College
Cassie Moss (CM)	Head teacher, Yerbury Primary School
Tanya Watson (TW)	Head teacher, William Tyndale (Primary Academy)
Fiona Maccorquodale (FM)	Head teacher, Prior Weston Primary School
Penny Barratt (PB)	Head teacher, The Bridge Special School (Academy)
Susan Service (SS)	Head teacher, Islington Arts & Media Secondary School
Paul Lasok (PL)	Governor, St Aloysius Secondary School (and St Joseph's)
Claire Hersey (CHe)	Principal Finance Officer, City of London Academy Trust
Maggie Elliott (ME)	Governor, Montem Primary School (Edventure Collaborative Federation with Drayton Park ) (Vice-chair)
Andrew Bosi (AB)	Governor, Rotherfield Primary School
Mita Pandya (MP)	Executive Head, Archway and Willow Children's Centres

### Other Attendees

Cate Duffy (CD)	Interim Corporate Director People
Tim Partington (TP)	Head of Children's Services, Finance
Jane Wright (JW)	Manager Schools and EY Governance (Clerk)
Debbie Stevenson (DS)	Head of Early Years and Schools Funding
Alison Cramer (AC)	Assistant Director, School Support and Information Services
Candy Holder (CH)	Head of Pupil Services

### Apologies

Patrick Mildren (PM)	Head teacher, Canonbury Primary School
Fiona Godfrey (FG)	Head teacher, Kate Greenaway Nursery School
Nigel Smith (NS)	Head teacher, New River College (Pupil Referral Unit)
Francis Gonzalez (FrG)	Head teacher, Richard Cloudesley Special School
Anita Grant (AG)	CEO, Islington Play Association
Vicky Linsley (VL)	Head teacher, St Mary Magdalene Academy

### Not in attendance

Cllr Rakhia Ismail (RI)	Elected member
Joe Simpson (JS)	Governor, St Peter and St Paul's

	Agenda item	Action
1.	<p><b>Welcome/Apologies for absence/not in attendance</b></p> <p>AM-L welcomed all to the meeting. Apologies as above. It was noted that MP needed to leave by 3pm and CMA needed to leave by 3.15pm. Also that CHe was due to arrive a little late.</p>	
2.	<p><b>Minutes of the previous meeting held on 20 May 2021</b></p> <p><b>a. Accuracy</b> – the minutes were agreed as an accurate record of the meeting, subject to amendment of Item 4 (School Balances draft), page 4, CM comment not that activities may not take place but may have to be paid for in next year.</p> <p>‘CM commented that some savings may be false if activities had to be paid for in the following year...’</p> <p><b>b. Matters Arising</b> – there were no matters arising.</p> <p><b>AGREED</b></p>	
3.	<p><b>Schools forum composition</b></p> <p>The clerk (JW) gave a verbal report.</p> <p><b>3.1. Election of Vice-chair</b></p> <p>JW had emailed Forum members on 30 June for nominations and had received one nomination – Cassie Moss – from AM-L. ME seconded the nomination. There were no other nominations at the meeting. CM left the meeting while Forum discussed the nomination – CM was elected unopposed. CM rejoined the meeting to be informed of the outcome.</p> <p><b>3.2. Upcoming elections/appointments</b></p> <p><b>3.2.i. Non Schools Member Early Years Practitioner representative</b> vacancy from 30.8.21 (currently MP)</p> <p>JW had liaised with Tracy Smith (TS), the Head of Early Years and Childcare Standards. TS had liaised with EY managers. As a result, Ana Sevilla, Executive Head of Packington and New River Green Children’s Centres, will take up the role from 1 September 2021 to 31 August 2025. After discussion, it was agreed that, as permitted by the section in the Terms of Reference about substitution, while Ana would be the main representative, she would be supported if necessary by Ann Curran, Head of Nursery, New River Green CC.</p> <p><b>3.2.ii. Non Schools Voluntary &amp; Community representative</b> from 27.9.21 (currently AG)</p> <p>- JW had attended the Early Years Providers’ Forum on 29 June attended by voluntary nurseries to encourage them to nominate themselves or be nominated. As of 15 July, JW had received no expressions of interest. As AG had already agreed to take up the role for one final term of office, subject to her confirming she still wanted to do this, AG will be appointed for that final term running from 28 September 2021 to 27 September</p>	Clerk

	<p>2025. Update after meeting – AG has confirmed she will take up the position.</p> <p>3.2.iii PRU (New River College) from 25 October 2021 (currently NS) – not discussed.</p> <p><b>NOTED AND AGREED</b></p>	
<p><b>16.a.</b></p>	<p><b>AOB – Collaborative School Improvement proposal</b></p> <p>Cate Duffy (CD), Interim Corporate Director, People, was welcomed to the meeting. It was agreed to take this AOB at this stage as CD needed to attend another meeting immediately after this item.</p> <p>CD was testing the water to sound out Schools Forum on a proposed model of school improvement, school-led with local authority (LA) facilitating.</p> <p>The proposal included having a pot of funding to support action research projects across schools, with solutions to common challenges being tested out. The pot would come from £250K of High Needs (DSG) underspend, match-funded by the LA to create a total of £500K. Schools and academies would be able to bid for this funding. This equated to about £8K to £9K per school, £30K for 3 schools in a project.</p> <p>The parameters would be established by a steering group. One idea was to encourage new collaborations between schools.</p> <p>In answer to questions from Forum members, CD clarified the following points:</p> <ul style="list-style-type: none"> <li>• In other LAs, groups of schools have engaged in peer reviews on common aspects such as pace and challenge in the classroom</li> <li>• In Slough a focus was KS2 reading – action research on what resources are available and what can be adapted</li> <li>• Other examples might be building capacity for inclusion or reducing exclusions</li> <li>• This was a one-off request to use some HN underspend and the LA was offering match-funding only in relation to this proposal</li> <li>• A formal paper will set out the details of the application process and who makes the decisions</li> <li>• If the HN underspend was not spent on this, it would be carried forward to next year unless there were other proposals for how to spend it</li> <li>• CD acknowledged the pressures on SEND funding but expected some projects would be likely to be focusing on SEND</li> <li>• CD felt, in answer to a suggestion by ME to require the projects to relate to HN, that it was very likely they would</li> </ul> <p>PB felt uncomfortable that the HN committee had not had the opportunity to discuss this.</p> <p>AM-L thanked CD for her report, looked forward to her coming back to Forum with a more formal proposal and asked her to take on board the comments of Forum.</p> <p><b>NOTED</b></p>	
<p><b>4.</b></p>	<p><b>School Balances (FINAL - prior year)</b></p> <p>DS spoke to a report that had been circulated prior to the meeting.</p>	

	<p>Initial findings <b>before</b> information was available on schools planned use of revenue balances earmarked for capital purposes were:</p> <ul style="list-style-type: none"> <li>- 2020-21 school balances totalled £9,458,688 compared to a balance of £10,274,842 in 2019-20.</li> </ul> <p>Schools (33 as of 1 July) had submitted final budgets for 2021-24 including their planned use of surpluses since the last Schools Forum meeting. The planned use of surpluses in some cases were for a broad range of uses, rather than just capital.</p> <p>It was confirmed that nine schools had ended the financial year 2020-21 in deficit.</p> <p>Some schools were in significant surplus. One proposal was for the LA to meet with those schools with consistently high balances exceeding 10% over a 3-year period and who are not projecting a deficit balance in 2021-22.</p> <p>CM asked if the percentage of staff being lost in reorganisations, and the impact on provision and effectiveness, were being recorded. DS replied that Human Resources are recording impacts on staffing. DS also referred to the dashboard tab on the Schools Financial Values Standard (SFVS) – which showed the extent to which a school was in line with other schools in relation to financial management. DS added that the DfE was aware of pressures on schools, and at Corporate Director level, the LA can try to get messages to the DfE about the impact on the workforce of the budgetary situation.</p> <p><b>Recommendations</b> that Schools Forum notes</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 2020-21 schools’ balances position after deduction of earmarked revenue balances for capital purposes</li> <li><input type="checkbox"/> The overall decrease in schools’ balances</li> <li><input type="checkbox"/> 2020-21 deficit schools and schools that have moved out of deficit in this period</li> <li><input type="checkbox"/> Schools forecasting a deficit position for 2021-22</li> </ul> <p>That schools with high balances, over 10%, meet with the Local Authority where they meet the following criteria:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Consistently high balances exceeding 10% over a 3 year period</li> <li><input type="checkbox"/> Are not projecting a deficit balance in 2021-22</li> </ul> <p>Deficit schools and planned action</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> As per scheme, deficit schools are required to submit monthly monitoring including revised Deficit Recovery Plans (DRP) identifying potential risks to their plans. This must be received by Schools Finance within the first 10 days of each calendar month.</li> <li><input type="checkbox"/> Progress will be measured against DRP and reported to Corporate Finance.</li> <li><input type="checkbox"/> LA to work with deficit schools to ensure DRPs are realistic focusing on key aspects of their assumptions; pupil numbers and income projections.</li> </ul> <p><b>NOTED</b></p>	
5.	<b>DSG Outturn (FINAL – prior year)</b>	

	<p>TP reported to a paper that had been circulated.</p> <p>There were no changes from the position at the May Schools Forum.</p> <p>Proposals for use of underspends were covered in other items on the agenda.</p> <p><b>NOTED</b></p>	
<p>6.</p>	<p><b>DSG Allocations (in year)</b></p> <p>DS spoke to a report that had previously been circulated.</p> <p>This year (2021-22) only, the DfE was allocating EY funding on the basis of the May and October Census in recognition of the impact of COVID on numbers in settings. The May Census will be useful for adjustments for 2020-21.</p> <p>The final EY 2020-21 allocations will not be known until November.</p> <p>DS advised Forum that there was nothing unexpected here.</p> <p><b>NOTED</b></p>	
<p>7.</p>	<p><b>Scheme for Financing Schools 2021-22</b></p> <p>DS spoke to a report that had previously been circulated. Decisions were needed for this item.</p> <p>DS was pleased with the level of response to the recent consultation. The comments revealed some misunderstandings – valid points but not understanding the intention of the questions. LAs can ask maintained schools for information for example about pupil number projections (which in turn determine income assumptions).</p> <p>DS went through each question in the consultation report highlighting where there were challenges or disagreements.</p> <p><b>2.2 Monthly monitoring in the final quarter including material variances.</b></p> <p>This was the closest in terms of votes. DS understood schools' reticence, but it was necessary to avoid the significant shifts in forecast balances in the last three months of 2020-21 (and in previous years). Good practice in schools' processes would include monthly budget monitoring. To do so in the final quarter would help when planning for year-end eg identifying accruals. DS spoke to some of the comments raised in the schools' responses, in particular in relation to EY funding and adjustments in the final term. Schools are able to use to the EY forecast tool to project final adjustments.</p> <p><b>AGREED</b></p> <p><b>2.3 Question 3 - Submitting budget assumptions when sending their 3-year ratified budgets</b></p> <p><b>AGREED</b></p>	

#### **2.4 Question 5 – the proposal of reforecasting and submitting revised budget plans in the autumn term**

Responses were more even. AM-L expressed her concern about the workload implications. DS said that budget monitoring and adjusting forecasting accordingly in years 2 and 3 were good practice. In 2022-23, schools would receive extra funding from the third and final DSG Settlement – this is not in the budget planner yet as we are waiting for confirmation of allocations and actual pupil numbers. Also, there are potential Pay Awards, still in discussion, to be announced by the autumn to factor in. Therefore, adjusting budgets for future years and presenting updated scenarios to governors would be a part of schools' cyclical processes.

JL flagged up the need for increased training of school business staff to help them get budgeting right. DS confirmed there would be more training for them, along with heads and governors.

DS said that the LA would not expect as much in-depth budget setting for years 2 and 3 in the autumn term, rather an update to DSG income, known October pupils numbers, updates to the pay awards and any known significant adjustments to income / expenditure. DS confirmed that once the DfE had released factor value information for 2022-23, the HCSS budget planner would be updated for all schools. So too would any pay award adjustments. This would assist the schools in updating their budget forecasts for years 2 and 3.

AB commented that in the past schools had been discouraged from focusing on years 2 and 3 because of too many unknowns. DS recognised that there are variables which are difficult to predict however good practice in schools processes suggest schools should be focussing on their longer term sustainability and reviewing future budget forecasts during the current financial year including when unknown variables become known.

TP reiterated that budget planning over 3 years was good financial practice. We are getting better up-to-date information for budgeting now. As extra information comes in projections should be updated – this allows more time to address budget issues. LAs do their budget management in this way.

SS objected to the expectation that schools had to post the projections to the LA – would prefer to be encouraged and supported to do those projections.

CM felt that projecting budgets in advance like this would reduce workload in the end – the sooner you know the real picture, the sooner you can take action and this minimises reductions you have to make, to the benefit of the school.

FM expressed her support for this requirement – her school has been in deficit and she found she had gained a good understanding of the challenges through the projection work and noted that the LA can help in Early Intervention.

There was a vote in relation to this question.

**AGREED** (3 members of Forum voted against)

#### **2.5 Question 17 – documenting in the appropriate governing body minutes where budget pressures have been identified potentially leading the school into a cumulative deficit position**

	<p><b>AGREED</b></p> <p><b>2.6 Question 9 - Including the purpose for which the 3-year budget plans will be used as evidence in supporting the assessment of the schools financial value standard (SFVS) and supporting the LA's balance control mechanism.</b></p> <p><b>AGREED</b></p>	
<p>8.</p>	<p><b>Schools Internal Audit Programme Outcomes (prior year)</b></p> <p>A report from Laura Westwood, Principal Auditor, had been previously circulated. DS was working closely with the Audit Team – useful for feeding in to training.</p> <p>JL commented that it would be helpful to have more information about what type of volunteers would need references.</p> <p><b>NOTED</b></p>	
<p>9.</p>	<p><b>Growth / Falling Rolls underspend – allocation proposals</b></p> <p>DS spoke to a report that had previously been circulated. A decision was needed on the use of the underspends.</p> <p>DS set out two proposals for allocating funds:</p> <p><b>Option A</b> - Allocate to all schools and academies based on pupil numbers (October 2019), shown in Appendix A, and</p> <p><b>Option B</b> - Target funds only to those schools that are adversely affected by their current Ofsted status and have not been able to recover their position due to the COVID-19 pandemic suspending Ofsted inspections. <b>Option Bi</b> - Funds could be further targeted to just those schools in this category that are also in deficit. Both options were shown in Appendix B. A level of accountability would be afforded to benefitting schools.</p> <p>Another option – to target all schools in deficit based on pupil numbers (October 2019) – had been discounted as balances for academies were not available to LAs. CHE commented that COLAI Highbury Grove will have a deficit. DS explained they would not be eligible as they do not meet two other criteria for FR funding – total number of pupils on roll dropped by at least 5% between last October census and the previous year's October census and a vacancy capacity of at least 15% (PAN).</p> <p>The final <b>Option C</b> was to carry forward for a further year to safeguard future roll reductions.</p> <p>AB queried whether it was acceptable to use carry forward for schools Requiring Improvement given this is not permitted for use of CF funding. DS said it was – it was not within the control of schools that Ofsted inspections had been suspended, whereas schools in deficit had some control over their finances.</p> <p>SS asked why we were using Census 2019 figures rather than Census 2020 – DS replied that the underspends related to that year.</p>	

	<p>There was a discussion about whether members of Forum whose schools stood to gain particularly from Option 2 could be involved in the decision – conflict of interest? DS reminded Forum members that they were there to represent their phase or category of settings as a whole.</p> <p>ME expressed concern about the small allocations to schools if split amongst all of them.</p> <p>TW was concerned that she had not asked primary academies for their views.</p> <p>After further discussion,</p> <p><b>AGREED TO OPTION B (NOT Bi) – 2 members had voted for the underspends to be carried forward and three members had voted for the underspends to be allocated to the four schools with RI, not just the three with deficits.</b></p>	
<p>10.</p>	<p><b>High Needs – Cluster Funding</b></p> <p>Candy Holder (CH) spoke to her report. (CMA left at 3.15pm)</p> <p>Funding for HN nationally was in crisis as evidenced in the report, with applications for Education, Health and Care Plans exploding along with complexity of cases. A Green Paper to address this had been due to be published on the day of this meeting, with an expected change to the Code of Practice. Vicky Ford, Minister for Schools, had instead published a letter acknowledging the problems but delaying the Green Paper for at least some months.</p> <p>Locally, we need to review our SEND strategy and build a system families can trust. CH had been working with heads to discuss principles and the way forward. She had met with Camden that day to look at how they allocate funding – Islington may be able to adapt its systems in line with their methodology.</p> <p>CH was pleased to have received 38 responses to a survey of schools – showing support for the principles but wanting more clarity on models.</p> <p>The LA is looking to pilot 1 or 2 cluster groups next term. This will leave approximately £150K of money set aside for cluster funding unallocated. It is proposed that this should be allocated across schools with most immediate SEND need in terms of volume and complexity.</p> <p>FM had been working on the SEND group and had found the experience valuable. In answer to her question, it was clarified that this money was not the same money that Cate Duffy had talked about at the beginning of the meeting.</p> <p>Capital Funding had all been allocated (£2.2m for 2018-21 and a further allocation of £1,8m announced for Islington in April 2021).</p> <p><b>NOTED</b></p>	
<p>11.</p>	<p><b>Early Career Teacher (ECT) funding arrangements (previously NQT)</b></p>	



	<p>A report had been circulated for information.</p> <p><b>NOTED</b></p>	
12.	<p><b>DSG Schools Block estimated funding (new year – 2022-23)</b></p> <p>A spreadsheet had been circulated. Unit values reflected current primary and secondary school rolls, but these will change.</p> <p><b>NOTED</b></p>	
13.	<p><b>Falling Rolls estimated allocations (new year)</b></p> <p>DS spoke to a report previously circulated.</p> <p>The assumption was the budget for Falling Rolls would remain at £400K in 2022-23.</p> <p>Appendix A showed funding for schools currently eligible – uncapped and capped for three years – in both cases £400K would cover this. Forum was reminded that if any schools with RI but otherwise meeting the criteria were inspected and moved to Good or Outstanding, so becoming eligible for FR funding, the budget would increase to up to £470K.</p> <p>An updated paper will be presented to Forum in November to include revised pupil numbers, following the autumn census, and known Base Rate factor values. Final DSG allocations will be announced in December and final budget recommendations will be presented at the January Forum.</p> <p><b>NOTED</b></p>	
14.	<p><b>Place Planning – Strategic Overview</b></p> <p>AC reported. The Terms of Reference of the Programme Board had been circulated to Forum with the minutes of the last meeting, as agreed.</p> <p>A workshop last week focused on place planning. A further workshop was due to take place immediately after this meeting with the wider group. The Programme Board would meet next Thursday to agree next steps in the autumn term.</p> <p>AB was directed to the School Places Planning report on the council website to find the data on which models were based. A more detailed presentation could be shared. Greater London Authority was now modelling the impact of COVID – further slight reduction in rolls. Rolls were not going to increase in the medium term.</p> <p>AC said the main focus at the moment was on primary admissions in September 2023.</p> <p><b>NOTED</b></p>	

15.	<p><b>Forward Planning</b></p> <p>DS spoke to a report that had been circulated prior to the meeting.</p> <p>The chair and vice-chairs were looking to refresh the forum and this will be discussed at next Schools Forum in October. AM-L will circulate the Best Practice Guidance to members for them to look at ahead of that meeting. She said Forum complied with about 50% of the guidance – a good team, members understanding their responsibilities, corporate understanding of how Forum should run. But it was difficult to fulfil responsibilities with papers not coming to them with sufficient notice and not in one batch.</p> <p>FM suggested papers could be managed on Governor Hub. JW agreed to look in to this. She also agreed to ask Business Support to send calendar invites to meetings. Another suggestion was a table showing when papers had been sent out.</p> <p>JW confirmed that JL had volunteered to join the Capital Subgroup.</p> <p><b>NOTED</b></p>	<p><b>AM-L</b></p> <p><b>Clerk</b></p>
16b.	<p><b>AOB – Fairer Funding Consultation</b></p> <p>DS reported verbally. This government consultation on the future of the forthcoming National Funding Formula (NFF) includes reference to Schools Forum. The government wants to get to implementation of the NFF at a slow and gradual pace. There will be limited changes in 2022-23 and 2023-24. 10% movement of funding for some schools to then measure the impact, then 15% in 2023-24 and 25% in 2025-26.</p> <p>The Minimum Funding Guarantee is remaining. Schools Forum will continue to have the ability to top-slice funding for Growth and Falling Rolls funding in 2022/23 but there are expected revisions thereafter.</p> <p>A question within the consultation proposes to move funding to an academic-year basis, as they do for academies – this would be good for schools, but challenging for LAs. This fits in with the agenda to move schools towards academisation.</p> <p>There will be further consultations in relation to the Schools Block and High Needs.</p> <p>DS said she would summarise the consultation document.</p> <p>ME asked if Schools Forum should make a representation. It was <b>AGREED</b> to hold a special DSG subgroup in September to discuss this – all Schools Forum member would be invited to attend.</p>	<p><b>DS</b></p> <p><b>DS</b></p>
	<p><b>PROVISIONAL DATES OF NEXT MEETINGS</b> (virtual meetings on MS Teams unless otherwise indicated)</p>	

**SCHOOLS FORUM**

Thursday 21 October 2021, 2-4 pm (Face to Face – venue TBC)

Thursday 25 November 2021, 2-4 pm

Thursday 20 January 2022, 2-4 pm (Face to Face – venue TBC)

Thursday 19 May 2022, 2-4 pm

Thursday 14 July 2022, 2–4 pm (Face to Face – venue TBC)

**DSG SUBGROUP**

Special meeting Thursday 16 September

Thursday 7 October, 2 – 3.30pm

Thursday 13 January, 2 – 3.30 pm

Thursday 12 May, 2 – 3.30 pm

Thursday 7 July, 2 – 3.30 pm

**EARLY YEARS SUBGROUP**

Friday 24 September, 1 - 3 pm

Friday 3 December, 1 – 3 pm

Friday 14 January, 1 - 3 pm

Friday 6 May, 1 – 3 pm

**CAPITAL SUB GROUP**

Friday 12 November, 12.30 – 2 pm (tbc)

Thursday 24 February – 12.30 – 2 pm (tbc)

Friday 13 May – 12.30 – 2pm (tbc)

**HIGH NEEDS SUB GROUP**

Monday 15 November – 11 am – 1 pm

Monday 7 March – 11 am – 1 pm

Monday 16 May – 11am – 1pm