

# Minutes (*Draft*)

## Schools Forum

Notes of meeting on 13 November 2024

### Members:

Paul Lufkin (PL)	Primary School rep (Wimbledon Park) - <b>Chair</b>
Steve Donegan (SD)	Primary School rep (Malmesbury) – <b>Vice Chair</b>
Rachel Shepheard-Walwyn (RSW)	PVI rep (Montessori Children’s House)
Adrian Laing (AL)	Secondary School rep (Wimbledon College)
Martin Roughley (MR)	Primary School rep (Cranmer)
Carla Chander (CC)	PRU School rep (Melrose)
Alun Evans (AE)	Academies rep (Benedict Primary)
Fr Simon Peat (FSP)	Primary School Governor rep (St Mary’s)
Chris Roberts (CR)	Secondary School Governor rep (Ricards Lodge)
Kirsten Taylor (KT)	Secondary School rep (Raynes Park High School)
Vacant	16-19 rep

### In Attendance:

Elizabeth Fitzpatrick (EF)	LBM CLLF – Director for Education and Early Help
Christina Pace (CP)	LBM CLLF - Director of Strategy, Commissioning and Partnerships
Ellis Kelly (EK)	LBM F&D – Head of Accountancy
Laura Byrnes (LB)	LBM CLLF – Strategic Lead
Collette Levingston (CL)	LBM F&D – Schools Finance Support Officer
Jayne Ward (JW)	LBM F&D – Schools Finance Support Officer
Patricia Kearney (PK)	LBM CLLF - Note taker

### Apologies:

Vacant	16-19 rep (Rutlish)
Emma Greer (EG)	Primary School rep (Pelham)

<b>1</b>	<b>Welcome and introductions – Paul Lufkin</b>
	PL welcomed everyone and noted apologies.
<b>2</b>	<b>Minutes from previous meeting – Paul Lufkin</b>
	Actions from last minutes were reviewed and the minutes of the previous meeting were agreed for accuracy. One amendment (regarding the practicalities of dedelegation) was agreed.
<b>3</b>	<b>Consultation for 2024/25 Schools Funding formula</b>
	EK presented the Consultation Document to Schools Forum for discussion and Schools Forum discussed the consultation questions below and provided comments and observations.

**Section 2.1.5 - Schools Funding Formula options**

*Merton proposes to replicate and maximise as many of the NFF factors as is possible to balance within the grant envelope. It aims to aligns the LA with the NFF before we are compelled to do so.*

**Schools Forum comments:**

CL talked through the factors (listed below) and Schools Forum suggested adding these to the consultation document and adding language to say this approach is broadly consistent with what has been taken in previous years. Schools Forum also suggested adding some context to explain how these factors impact the numbers. For example schools which have a higher level of deprivation or a lower level of attainment, however given the lack of information we have on the factors for 2025/26 this would be difficult to do in a way that adds meaning to schools being consulted. Agreed the question would be rephrased to say we propose broadly sticking with the same principles as 24/25 to largely replicate the NFF.

Factors:

AWPU

FSM

Ever 6

IDACI

Lump Sum

MPPL

**Section - 2.2 MFG percentage**

*The MFG in 2025/26 must be set at between -0.5% and 0%. Merton propose to maximise this at 0% as far as possible, though this cannot be confirmed until it can be considered alongside the other NFF values which are yet to be released.*

**Schools Forum comments:**

Schools Forum noted that in previous years the MFG percentage has been set above 0%. In 2025/26 the DfE have instructed this must be set at between -0.5% and 0%. Schools Forum discussed the rise in NI and the support that has been offered to public services, although we are still awaiting confirmation.

**Section 2.3 - De-delegation**

*For all of the services below, please state either Yes or No to indicate whether or not you would prefer the services to be de-delegated to the authority to be managed centrally rather than by each individual school. Any delegation that is not approved will result in the individual school needing to manage this activity themselves. Last year Schools Forum agreed to de-delegate all services.*

2.3.5 Contingency – Schools in Challenging Circumstances

2.3.6 Contingency – Attain

2.3.7 Contingency – Tree Maintenance

2.3.8 Primary school kitchen equipment replacement

2.3.9 Supply staff cost for parenting cover and public duties

2.3.10 Support to underperforming ethnic minority groups and bilingual learners

2.3.11 Behaviour support services

2.3.12 School improvement & Brokering

2.3.13 Attendance

**Schools Forum comments:**

Schools Forum discussed Option A, B, and C in detail and following discussion agreed to give 2 options for Attain, staying at 100k or reducing to 58k. This would also reflect the options for School Improvement, which would have two options – increasing by £42k; or by £100k (with £42k potentially being offset by a reduction in the de-delegated amount for Attain). Schools Forum discussed Attain funding, per pupil amounts and Schools Forum suggested to add to this question that these are absolute numbers and the Catholic Schools moving to and academy status and the impact this will have on pupil numbers, and therefore the per pupil funding.

Schools Forum discussed leading with outcomes rather than just the numbers to help provide more understanding to this question and get a more meaningful response.

Schools Forum discussed Schools in Deficit Budgets and the impact of single form entry schools and managing place planning strategy.

**Section 2.4 - Education Services for maintained schools**

*For 2025/26 Merton proposes to keep the amount static at £650k (£629k from the schools block and £21k from high needs block) retained to fund services previously funded by the Education Services Grant (ESG) (for maintained schools only).*

**Schools Forum comments:**

Schools Forum suggested adding a line noting falling roles due to academisation which will result in an increase by pupil amount. Broadly speaking each school on average will contribute more.

Schools Forum was asked to note as we go forward whilst rolls continue to fall and more Catholic schools join the Catholic Academy Trust we will be looking at the number we ask to de delegate.

**Section 2.5 - Growth/Falling Rolls**

*For 2025/26 Merton proposes to support schools with growth/falling rolls and earmark (retain) from schools block £300,000 in financial support to schools with growth (classes) or at the end of the financial year, distribute the £300,000 to schools with fallings rolls as in previous years.*

**Schools Forum comments:**

Schools Forum suggested to make it clearer that the majority of this funding is going to falling rolls. This fund also supports schools that are dropping from two year to one year entries to support with restructuring. To be eligible for support through Falling Rolls schools need to be good or better. *Post Meeting Note: EK has been reviewed and has found this is no longer the case. EK has clarified and updated the consultation document.*

CL explained the DfE changed the criteria last year for falling rolls. Prior to last year there was guidance and we could set our own criteria based on some the suggested criteria. To award falling rolls to a school it has to now satisfy SCAP (school capacity) data and whether those school places are going to be required in future years. This needs to be explored in more detail and further clarity added to the consultation document, as it will mean that not all schools with falling rolls will be eligible for this funding.

	<p><b>Section 2.6 - Transfer between blocks</b>  <i>For 2025/26 Merton proposes to maintain the transfer from the Schools Block to the High Needs Block. This is 0.5% of schools block (estimated to be c.£800k but the final figure will depend on final allocations) and will be used to continue to fund the increase in place numbers at special schools and growth in top-up (banding) fees.</i></p> <p><i>In support of the DSG Recovery Plan and Safety Valve Agreement a proposal to transfer an additional £500k cash (one year) from the Schools Block to the High Needs Block in support of the deficit recovery plan and working in conjunction with the DfE on the Safety Valve Programme. This would be subject to Safety Valve Team and Secretary of State (SOS) approval.</i></p> <p>Yes/No  Please state whether you would support this 0.5% transfer from the schools to the High Needs Block.</p> <p>Please state whether you would support the additional transfer of £500,000 in support of the Merton DSG Recovery Plan (a Dis-application request would have to be approved by the Safety Valve Team/Secretary of State)</p> <p><b>Schools Forum comments:</b>  Schools Forum discussed these proposals noting the support to Special Schools, HNB and impact on Academy Schools.</p> <p><b>Section 5.1.4 - High Needs Block - Targeted support to schools with high SEN pupil numbers</b>  <i>Merton is proposing to continue to provide additional funding outside the main funding formula for mainstream schools and academies. The proposal is to allocate an additional £350,000 for when mainstream schools have more than the average number of EHCP pupils. Distribution will be based on a percentage allocation.</i></p> <p><b>Early Years Block update</b>  LB explained the decision to defer the early years block consultation until information is confirmed and shared from the DfE. The childcare expansion is continuing to roll out, second phase of the reform only started in September so difficult to predict numbers at this stage.</p>
4	AOB – All
	<p><b>DSG Subgroup Update</b>  EF confirmed there was no meeting but provided a verbal update. The in year deficit is growing. The DfE are aware and have acknowledged all the actions we are doing to keep on track.</p> <p>EF provided an update on the rising number of EHCPs and the impact on Local Authority. The new Government has acknowledged the SEN system is broken and the uplift next year will be around 6% - 10% rather than the 2% this year.</p> <p><b>The next Schools Forum meeting is 16 January 2025</b></p>