

**Schools Forum Agenda
Monday 8 November 2021**

Time: 9.00am
Place: Virtual (Zoom)
Chair: Jolyon Roberts
Vice Chair: Theresa Staunton

Invited:

Headteachers

Academy Representatives: Jolyon Roberts, Chris Andrew, Soumick Dey, Rob Hitch, Rob Veale, Neil Ferrigan, Roger Capham, Tyrone Myton, Toby Martlew, Markie Hayden, Clare Cranham

Nursery Schools: Jaqi Stephenson, Jane Charman

Primary Schools: Leonore Fernandes

Secondary Schools: Patrick Shields, Nathan Walters

Special Schools: Lorraine Slee

PRUs: Jenny Adamson, Gareth Denton

Governors

Nursery:

Primary Schools: Dave Harvey, Keran Currie, Linda Alange, Andrew Rendle

Secondary Schools:

Non Schools

Post 16:

EY providers: Theresa Staunton, Christine Marchant

Southwark CofE Diocese: Josephine Copeland

Southwark RC Diocese: Linda O'Callaghan

Trade Union: Dave Winters, Joe Flynn

Cllr Majority: Group Rep: Joy Prince

Cllr Minority: Group Rep: Helen Redfern

Observers

Councillors: Alisa Flemming, Margaret Bird and Shafi Khan

ESFA: Murial Rant

General: Joe Harrison

LBC: Shelley Davies, Charles Quaye, Kathy Roberts, Sarah Bailey, Phillip Herd

Clerk: Heather Beck

VOTING GUIDANCE

School members - Green	Academy members - Yellow	Non- school members - Pink
<p>Only primary representatives (reps) can vote on primary school de-delegation</p> <p>Only Secondary school reps can vote on secondary school de-delegation</p>	<p>No voting on de-delegation</p> <p>All academies members can vote on any other Schools Forum business, including the consultation on the funding formula</p> <p><u>Observers – Mauve cards</u></p>	<p>No voting on de-delegation</p> <p>Only PVI representatives can vote on the consultation on the funding formula</p> <p>All non- school members can vote on any other Schools Forum business</p>

All schools members can vote on any other Schools Forum business, including the consultation on the funding formula

Croydon Council website Link to Schools Forum:

<https://www.croydon.gov.uk/education/schools-new/statnotice-consult/croydon-schools-forum>

Item	Agenda items	Lead	Time
1.	Minutes and actions from last meeting (4 October Virtual meeting via Zoom)	Jolyon Roberts	9.00 – 9.05
2.	Dedicated Schools Grant (DSG) Schools Block Formula Factors Review	Charles Quaye	Start 9.05
3.	Dedicated Schools Grant (DSG) Funding Formula 2022/23 – Split Site factors	Charles Quaye	Finish 10.35
4.	Update from Schools Forum Work Groups (for information) a) Early Years b) Schools Block c) High Needs	Theresa Staunton Patrick Shields Rob Veale	10.35 – 10.50
5.	Any Other Business	All	10.50 – 10.55

Meeting dates for 2020/21, Monday from 9am – 12noon:
4 October 2021, 8 November 2021, 6 December 2021, 17 January 2022
7 March 2022, 13 June 2022, 11 July 2022

Item	6 December 2021	Lead
1.	DSG Management Plan, Progress Report (Q2 2021/22)	Charles Quaye
2.	Maintained Nursery report	Theresa Staunton
Item	17 January 2022	Lead
1.	DSG Management Plan, Progress Report (Autumn Term / Q3 2021/22)	Charles Quaye
2.	Beckmead outreach contract – report update	Charles Quaye
3.	Review of contracts paid for by DSG	Charles Quaye
Item	7 March 2022	Lead
1.	DSG Management Plan, Progress Report (Q3 2021/22)	Charles Quaye
2.	Progress Report – Phase 1 and Phase 2 Expansion of the Locality SEND Support Project	Mark Southworth
3.	School Audit Programme	David Phillips
Item	13 June 2022	Lead
1.	Dedicated Schools Grant (DSG) Outturn report 2021/22 – paper report	Charles Quaye
2.	2 year project - drop in numbers regarding birth-rate – report update	Ashana Graham
Item	11 July 2022	Lead

STANDING ITEM FOR JANUARY – Croydon Recovery Plan

STANDING ITEM FOR JUNE – DSG Year-end Outturn report

STANDING ITEM FOR OCTOBER – Election of Chair and Vice Chair

- Chair and Vice Chair of All sub groups to be appointed by Schools Forum
- All sub groups to share revised Terms of Reference and confirm Chair/Vice Chair details

STANDING ITEM FOR NOVEMBER – DSG Schools Block Formula Factors Review

SF Work Groups Meeting Dates

Early Years, Tuesday 10am – 12pm: Chair is Theresa Staunton, Vice Chair is Jaqi Stevenson

Meeting dates for 2021/22

28 September 2021, 2 November 2021, 30 November 2021, 11 January 2022, 22 February 2022, 24 May 2022, 5 July 2022

High Needs, Wednesday 10am – 12pm: Chair is Rob Veale, Vice Chair is Lorraine Slee

Meeting dates for 2021/22

22 September 2021, 19 October 2021, 17 November 2021, 12 January 2022, 2 March 2022, 5 May 2022, 22 June 2022

Schools Block: Tuesday 10am – 12pm: Chair is Patrick Shields, Vice Chair is Markie Hayden

Meeting dates for 2021/22

14 September 2021, 12 October 2021, 23 November 2021, 8 February 2022, 11 May 2022, 28 June 2022

Schools Forum

Minutes of Meeting held on Monday 4 October 2021 Virtual (via Zoom)

Members Present: Keran Currie Nathan Walters
Patrick Shields Rob Veale
Lorraine Slee Jenny Adamson
Neil Ferrigan Tyrone Myton
Dave Harvey Chris Andrew
Linda O'Callaghan Jaqi Stevenson
Jane Charman Soumick Dey
Leonore Fernandes Toby Martlew
Markie Hayden Clare Cranham
Cllr Margaret Bird Cllr Joy Prince

Observers Present: Shelley Davies (part) Charles Quaye
Phillip Herd Andrew Rendle

Apologies: Roger Capham, Josephine Copeland, Dave Winters,
Kathy Roberts

Chair: Jolyon Roberts
Vice Chair: Theresa Staunton

Clerk: Heather Beck

	Declaration of Interest There were none.	
	The Chair welcomed everyone to the meeting including new members. Observer at the meeting today was: Andrew Rendle – Governor at St Nicks, former Cllr The meeting was quorate.	
1:	Minutes and actions from the last meeting (12 July Virtual Meeting – Zoom) <u>Matters arising from the minutes</u> Page 3, Action – letter to the Sisters of Our Lady of Fidelity. Jolyon Roberts (JR) had a conversation with catholic colleagues and officers on the steering group and the collective view was that it would serve no purpose to send the proposed letter and that Forum would not be able to influence this decision in any way through sending such a letter. The decision was not to go ahead with writing the letter.	

	<p>Dave Harvey said he was disappointed and that it was not the question of writing to Virgo as it did not exist, but writing to the Sisters of Our Lady of Fidelity that own the building. It was the Sisters that decided to discontinue educating the girls who were still at Virgo and that they decided to invite a new cohort of students into the building. He felt this left Forum to pick up a bill running into over £1M.</p> <p>Jolyon Roberts informed Dave Harvey that Forum were not picking up that bill as Croydon will be picking up this amount.</p> <p>Dave Harvey welcomed Jolyon Roberts update and asked whether the amount of money considered by Forum was not affected by this.</p> <p>Jolyon Roberts said it was not affected.</p> <p>On that note, Dave Harvey withdrew.</p> <p>Page 3, Item 2. Para 2 -audit subcommittee of Forum. Jolyon Roberts said a lot of work was carried out on the documents for the audit programme, a lot of attention made on the audit scheme for the forthcoming year and these will be put on the audit page.</p> <p>Page 4, Item 3 – SRMA Verbal Update - Orlagh Guarnori has been promoted into a secondment within Croydon and Charles Quaye has been appointed as her replacement and he is appreciated by Forum.</p> <p>Page 6, Para 4 – ACTION by Kathy Roberts to be carried forward.</p> <p>All other actions have been completed and minutes agreed.</p> <p><u>Schools Forum membership update.</u></p> <p>Jolyon Roberts informed new members of the voting process.</p> <p>Kevin Standish from John Ruskin resigned and Jayne Dickenson, Chief Executive and Principal (Orbital South College Group) is willing to take this role on in the interim.</p> <p>The clerk gave an update on the Schools Forum vacancies for the Maintained School Governor. The advert closed on Friday 1 October 2021 and 3 ballots were received. Pick up in POST MEET</p>	<p>Kathy Roberts</p> <p>Jolyon Roberts</p>
<p>2:</p>	<p>Election of Chair and Vice Chair</p> <p>Shelley Davies took the role of Chair in order to complete the election for Chair and Vice Chair.</p> <p>Jolyon Roberts had indicated that he is willing to stand again as Chair and Chris Andrew seconded this.</p> <p>Patrick Shields nominated Theresa Staunton as Vice Chair and Linda O’Callaghan seconded this. Theresa Staunton accepted this position.</p>	

	<p>A unanimous vote by Forum was carried for Jolyon Roberts to remain as Chair of Schools Forum and Theresa Staunton to remain as Vice Chair of Schools Forum. Congratulations to them.</p> <p>Jolyon Roberts thanked Forum members for their vote of confidence and said it was very important for Schools Forum, and especially the Chair, to have an understanding of the background to decisions over time which is why he was willing to carry on in this role.</p> <p>Jolyon Roberts wished the LA good luck with the SEND Ofsted inspection.</p>	
3:	<p>Chair and Vice Chair of All sub groups appointed by Schools Forum</p> <p>Jolyon Roberts said the Schools Forum Work Groups are chaired by nominated members of Schools' Forum. The Schools Forum steering group meet 3 times a month and the Work Group leads are invited and attend the meetings.</p> <p>a) Early Years (EY) – Theresa Staunton is Chair, Chris Marchant is Vice Chair; b) High Needs (HN) – Rob Veale is Chair and Lorraine Slee is Vice Chair; c) Schools Block (SB) – Patrick Shields is Chair, Vice Chair tbc</p> <p>EY: Theresa Staunton agreed to continue as Chair and Jaqi Stevenson was nominated as Vice Chair; HN: Rob Veale agreed to continue as Chair and Lorraine Slee as Vice Chair; SB: Patrick Shields has agreed to continue as Chair and Markie Hayden was nominated as Vice Chair.</p> <p>The Schools Forum unanimously agreed the six appointments to lead the Working Groups.</p>	
4:	<p>Terms of Reference of Schools Forum Work Groups</p> <p>Jolyon Roberts said there are three Schools Forum Work Groups comprising of:</p> <ul style="list-style-type: none"> • Early Years • High Needs • Schools Block <p>The Terms of Reference included in the papers are mostly unchanged. Members must be members of Schools Forum. The Work Groups are advisory groups and it is the Schools Forum who have the capacity to make decisions.</p>	

	<p>Neil Ferrigan commented on the Early Years ToR – Page 26 and pointed out an accountability provision that is in the High Needs ToR but this does not appear in Early Years ToR.</p> <p>Compare the Early Years and High Needs ToR regarding accountability provision – Pick up in POST MEET</p>	<p>Jolyon Roberts</p>
<p>5:</p>	<p>Dedicated Schools Grant (DSG) School Funding Formula 2022/23 Formula Factors</p> <p>Charles Quaye (CQ) presented this paper</p> <p>Jolyon Roberts informed new members that the duty of Schools Forum is about accountability, how some of the money is spent, e.g. payments for Virtual Schools etc. and that it is useful to keep an oversight of what is happening. The main job of Forum every year is deciding on the formula for the following year. This paper is the beginning of that process and the beginning of the school funding formula process for April and September 2022/23. The main decision making papers will take place in October with percentages on each factor.</p> <p>CQ referred to the Background information in Point 1 and the Provisional funding allocation in Point 2.</p> <p>Table 1 illustrates the Schools Block provisional allocation for 2022/23. This shows there is a growth of £5,020,707 additional DSG given to schools.</p> <p>Table 2 indicates all the formula factors requiring approval.</p> <p>CQ referred to 3.12 – which was a proposed change from last year’s formula Split sites and said that historically we have been taking this split sites funding from the growth fund but it is now proposed to add it once again to the main formula. Table 4 illustrates the factors available in the APT. The DfE provide other factors that the LA can adopt. Croydon is not currently using this.</p> <p>Jolyon Roberts said that the recommendation is to stick to the factors that we have except that we bring the split sites factor, which was previously in the growth fund, into the main formula. The amount being paid is not to be decided here. If we include the split sites factor, the amount it is paid at will be dealt with at Schools Block and at the next Schools Forum.</p> <p>Q1: Tyrone Myton questioned who do we determine has Low Prior Attainment (LPA) or not if the pupils are not doing KS2 SATs; Q2: Jolyon Roberts asked CQ how LPA was measured in terms of the money allocated and described in Table 2, Factor 4. Given that there were not SATs, how do we decide on LPA?; A2: Patrick Shields said for the upper year groups there will be a categorisation for LPA. He suggests, going back to the decision</p>	

	<p>today of keeping the factor in, the decision at the next meeting is what we do with the factor. As there is a Schools Block meeting next week he could carry out research before this - ACTION, as to what will be done with the younger year groups where there are no SATs. He will be advocating strongly that we keep this in as a factor.</p> <p>Jolyon Roberts said this is quite a big factor for Croydon and that Patrick Shields will examine this at the Schools Block meeting.</p> <p>Q3: Jenny Adamson asked about the sparsity factor and if it was about small/and geographically isolated schools or small/or geographically isolated schools;</p> <p>A3: Phillip Herd told Forum that this was a very complicated factor and that is was about small and rural schools and the nearest school has to be 2 miles away. In the case of Croydon schools this factor will not apply.</p> <p>Jolyon Roberts reminded members that the way Forum supports its small schools, its one entry form schools (there are not many left), is by paying the lump sum to everybody at the same rate, regardless of the size of the school.</p> <p>Those in favour of the recommendations re factors to include in the formula = 16 Abstention = 0</p>	Patrick Shields
6:	<p>Dedicated Schools Grant (DSG) Deficit Management Plan – September 2021</p> <p>Charles Quaye (CQ) presented this paper</p> <p>Jolyon Roberts asked Dave Harvey if he had received a briefing paper about moving to a hard formula from the local government association or London councils. He is on the opinion that, given the very many delays that have already taken place in regard to the move to the hard formula that we may in fact never move to the hard formula. It is the view of the London councils, expressed in their letter, that a move to the hard formula disadvantages London schools and that therefore it would be best if we never go to a hard formula.</p> <p>CQ said all LAs with an overall deficit on their DSG account, at the end of 2020 to 2021 financial year, are expected to meet 3 conditions as follows:</p> <ul style="list-style-type: none"> • Prepare a deficit recovery plan to demonstrate how you will bring this in line with the budget in 3 years. This has now been extended to 5 years; • All LAs are required to have a regular meeting with the DfE to review their plan. Croydon had a meeting last week Wednesday 29th September; • LAs to report to Schools Forum with a paper of their plan. 	

The paper being presented here is part of the grant conditions to meet the 3rd condition.

The deficit recovery plan commenced last year. Page 2, 1.5 highlights the final High Needs block outturn for 2020/21 of £66.982m against the DSG final allocation of £61.239m. Note that there is a variance overspend of £5.743m. The planned forecast expected is £4.474m which shows a deviation. This does not mean the plan did not work. There were some last minute payments which were not factored into the plan at the time – these are shown in Table 1.

Table 2, 2.3 shows how the financial year for 2019/20 ended with £6.7m. 2020/21 ended with £5.7m due to the last minute one off payments. Looking at the trend, for the first time Q1 shows £3.5m and Q 2 £3.6m which shows the plan is working. Table 3 shows a problem with the cumulative variance of £27.6m. This cumulative deficit is highly unlikely to ever be addressed by means of the deficit management plan but only by an increase in central government funding. The only way that Croydon could make an impact on a deficit of this size is by ceasing services but these services are statutory

Table 4 is based on these assumptions. By the end of 2025/26 the deficit will be £33,408m if the LA did nothing. One of the questions the LA was asked in the meeting last Wednesday with the DfE was why we are not making any more gains from 2023/24 onwards. This is due to uncertainty with the future. The LA is taking a pessimistic view and the reason for this is that the DfE formula does not give you scenario options. The LA template only provides one scenario – do nothing option.

CQ referred to Work streams, point 4.1 b). The LA saves a huge amount of money placing children in local schools as opposed to placing them in the independent schools. The more the LA creates more places within its local maintained special schools then the more the High Needs block can be in budget

The only consolation we have is that the DfE has said that we might very soon be added among those LA who might get help in terms of clearing the backlog. The DfE is asking to see more pupil numbers that match their data which is additional work that the LA will be working on.

Jolyon Roberts clarified that the highlighting in yellow was added by the steering group to bring to everybody's attention. In 1.7 – everyone should note that the cumulative High Needs block overspend at the end of March has now reached a new peak of £24.21m. We have reached a point of pragmatism, where we understand, that no amount of savings, that we are going to make, to the ongoing budget is going to claw back £24m. This cannot be fixed by in-year savings. Croydon is by no means the worst affected LA in

the country. Some LA are having their debt addressed by the DfE but Croydon does not yet meet this threshold.

The other point highlighted by the steering group is shown in Table 2. Although the over spend is still going on year after year, if you look at it over time, it is coming down. Table 2 - compared to financial year 2019/20 shows £6+m overspend in each quarter. Last year we were doing extremely well until the final quarter when the overpayments had been missed, somewhere along the line, came in. These overpayments are shown in Table 1. The steering group were assured by the officers that there were no further outstanding amounts to be paid for the past and that there is now a payment schedule in place.

Rob Veale said Jolyon Roberts explained the context behind what CQ was saying really well. He stressed that it is really important that we do not get caught out with any demands for payments ever again. In terms of the High Needs working group, a robust meeting was held on 22 September 2021 to hold officers to account in terms of knowing who we owe moneys to. One of the cases was a considerable amount to one school in our borough of £220k in terms of outreach work. It is very much making sure that we know the contract, when it ends, what we are getting for our money and the impact of that. He also wanted noted, like a lot of London boroughs that we are still seeing a real increase in our EHCP children and this demand does not seem to be going anywhere. Pupil numbers are reducing yet still the demand for EHCPs is going up and he is not sure if this is to do with lockdown.

Markie Hayden asked if there was a plan for more in-borough SEND provision such as using the St Andrew's site as there is more need?.

Jolyon Roberts said the question cannot be answered as Shelley Davies and Kathy Roberts were absent from the meeting. As described in CQ paper the amount of places we offer in-borough has expanded enormously as a result of the Addington Valley Academy and the expansion of a couple of our own special schools. We are offering more places yet the demand is continuous. We are also examining a couple of contracts which seem to rolling around with no accountability.

Q1: Neil Ferrigan asked whether a Covid impact factor had a play here or is this something we have to contend with;

A1: CQ said if there is any Covid impact benefit it would be to some of the schools where the children did not go to school. The DfE does not ask the LA to check with schools whether the children were at school and then claw that money back. In terms of this paper, the LA has not investigated the schools. There were grants given to schools to assist them. This forecast is not looking at schools to exploit them. There is no evidence to say the over spend will get worse through Covid.

Jolyon Roberts said it should not get any worse as in many ways the financial situation has possibly improved through Covid e.g. through agency staff.

Jenny Adamson said the PRUs pupils were not eligible for transport but felt there was an impact as fewer additional agency staff were employed by them. The intake of pupils was lower because schools kept their pupils during Covid. The PRUs are now seeing the impact of this now as there has been an avalanche of permanent exclusions.

Q2: Rob Hitch noticed that his school is struggling with Y9, Y10 and Y11 placements, particularly for students with EHCP and where a specialist provision has been named. Is there a significant risk with payments being paid outside of borough or independent schools placements – is this risk captured in this item;

A2: Jolyon Roberts said he is investigating a couple of case studies with Kathy Roberts and her team around last ditch placements into independent. Croydon's strategy is to place our own children in our own schools. He asked Rob Hitch to forward any case studies to him. The overall spending to independent is falling over time and has fallen from around £14m to £11m.

Q3: Dave Harvey referred to Table 1 C) and asked how we got into this situation where 2 pupils were placed at a school in Cranleigh at a cost over £100k each. He also referred to D) Red Gates school as it shows such a contrast and E) Harris Federation - what are these historical cases and can he see evidence of how this has accumulated? This is ½ of the £1.2m that has caused the upturn in the reduction of the deficit;

A3: Jolyon Roberts will take the questions away for the steering group answer in POST MEET - **ACTION**

Jolyon Roberts

Rob Veale said though there is the ambition to educate all children within Croydon, there will always been specialist places needed. To get an out of spend to zero for Croydon is not feasible. We need to think about promoting the excellent work of the special schools within Croydon.

Q4: Jolyon Roberts is perplexed as to why pupil numbers are falling yet EHCPs are not falling. He asked Keran Currie if it was still her feeling that the 18-25 numbers are driving that;

A4: Keran Currie said this was not the case. There is a marked need in the early year's region and that there are a number of children at home unstimulated. Children are coming into many schools with a much higher complex need. These children may not have met a member of the early year's team as they are just not known to them. These children are coming into the mainstream schools. There is no mechanism at this time to quickly identify these children and get someone out to see them or give the school the funding or support they need. What is going to happen is that the SENCOs are forced to put through requests for education health care needs assessments in order to action the relevant assessments. In some cases to trigger the waiting list for our

specialist settings of which there are none. Another strategic element being looked is starting conversations with our specialist schools within the mainstream localities support programme to gather their expertise, SENCOs seeking advice, modelling, to allow us to support the children who are already in our schools with much higher needs.

Toby Martlew said limited EP allocations are now capped in terms of how many hours EP's can offer each school - which causes a funding and provision gap. Returns from home schooling during COVID have been an issue for them as well.

Rob Veale said it now becomes part of a collective agenda and is not only down to High Needs working group or the officers. It is an overarching Croydon issue that all of us will need to tackle. We must make sure the conditions are right in mainstream schools and that we challenge head teachers when they say that they are unable to cope. Atwood has supported 6/7 Y6 pupils with EHCP and this Y6 cohort have now left. His philosophy as a parent with complex children, is that he would want the very best for them. We are having to face really tough issues and it is incumbent on every head teacher to do their bit.

Karen Currie said there is a lot of pressure on the High Needs block and that Kathy Roberts is well aware of this and is working with the teams. An early years' strategy for High needs is also being worked on. Apart from this there is another issue being looked at and this is that some early years providers (not mainstream LA) are saying they cannot provide/share information with the schools of where the children are going or share their files. This is another situation causing gaps where schools cannot pick up the information and this is a big concern.

Theresa Staunton said because it is not statutory, you have to have parents' permission to pass on information. There are conversations to be had but if a parent actively refuses to allow any intervention in early years and mainstream, then there cannot be any involvement. After the age of 5 the statutory duty of a parent changes and allows schools to put this in place.

Jolyon Roberts said there is a full set of minutes on this and we understand the situation, the DSG, particularly the High Needs block of the DSG are in. We note the action plans which are showing a couple of green shoots. Is there an accounting colleague taking up a post in High Need?

CQ said yes and that Henrietta has been brought back into the service. He assures Forum that High Needs is one of his priorities due to the high risk.

7:	<p>Update from Schools Forum Work Groups (for information)</p> <p><u>Early Years Working Party (Theresa Staunton)</u></p> <p>A meeting was held and the paperwork will be presented at the next Schools Forum.</p> <p><u>Schools Block Working Party (Patrick Shields)</u></p> <p>Update at the next Schools Forum.</p> <p><u>High Needs Working Party (Nick Dry)</u></p> <p>High Needs met on 22 September 2021 and the minutes are in the process of being issued. In essence what we point out as we move forward, is the openness in terms of Croydon and the LA SEND structure. The working party were interested in who is doing what in the Council and will be looking with baited breath about what comes out in the inspection. He hopes this goes well for everyone. The working party looked at getting a dictionary on the abbreviations of everything. It is about having that drive for openness. A long time was spent on looking at the deficit management plan and this touched on the importance of knowing what money is going where, the contracts and the impact. Mark Southworth gave an update at the meeting on the SEND locality support and it was agreed that for relatively little money it is having high impact. For high needs support 45% of the budget has been spent in that area, on average, equating to between £2000 - £3500 which is less than an EHCP. We touched upon the special schools funding arrangements which is a huge piece of work. There should be a framework for banding funding taking place. He understands 1:1 meetings with heads may have happened followed on by work being done this month with the plan in November where budgets for special schools will be ready.</p>	
8:	<p>Any Other Business</p> <p>Jolyon Roberts said the steering group are investigating meeting colleagues in person for the Schools Forum, maybe looking at a hybrid model before December. The clerk was informed that there were no available big rooms in BWH and the town hall. Cllr Prince will assist Shelley Davies in pursuing a venue - ACTION</p> <p>Jenny Adamson would like colleagues to consider, before flipping back to face to face meetings, one of the benefits and great advantages to meeting virtually. For schools this increased involvement exponentially with multi-agencies in-borough an out of the borough. Is it always the best move to go back to face to face without exploring and discussing why we are doing this, why it is important and what value does it add if we are in a room together, as opposed to meeting virtually.</p>	Cllr Prince/ Shelley Davies

	<p>Jolyon Roberts assured Jenny Adamson that he was not looking to go back to face to face immediately, but to look at some of each.</p> <p>Forum members were encouraged to join a working group and Jolyon Roberts asked the new members to make contact with the Chairs of the groups or the clerk to sign up - ACTION.</p>	Forum members
	Next meeting 8 November 2021	

DRAFT

Abbreviations used within the minutes

AVA	Addington Valley Academy
AWPU	Average weighted pupil unit
BWH	Bernard Weatherill House
CALAT	Croydon Adult Learning and Training
CHTA	Croydon Headteachers Association
DfE	Department for Education
DSG	Dedicated Schools Grant
EAL	English as an additional language
ESOL	English as a second/or other language
ESFA	Education Skills Funding Agency
EHCP	Education, Health and Care Plan
E-PEP	Electronic Personal Education Plan
ESG	Education Services Grant
EY	Early Years
FSM	Free School Meals
GLA	Greater London Authority
GPAC	General Purpose Audit Committee
IDACI	Income Deprivation Affecting Children Index
IMD	Index of Multiple Deprivation
INM	Independent/non-maintained
KPI	Key Performance Indicator
LA	Local Authority
CLA	Child Looked After
LLW	London Living Wage
LPA	Low Prior Attainment
MAT	Multi-Academy Trust
MFG	Minimum Funding Guarantee
MNS	Maintained Nursery Schools
MHCLG	Ministry of Housing, Communities and Local Government
NEOST	National Employers Organisation for School Teachers
NEET	Not in Education, Employment or Training
NFF	National Funding Formula
PAN	Planned Admission Number
PEP	Personal Education Plan
PFI	Private Finance Initiative
PPG	Pupil Premium Grant
PPL	Private Public Limited, Consultancy Firm
PVI	Private, voluntary sector and independent providers
SLA	Service Level Agreement
SRMA	School Resource Management Adviser
STPCD	School Teachers Pay and Conditions Document
STRB	School Teachers Review Board
ToR	Terms of Reference
TPA	Teacher Professional Association
UAS	Unaccompanied Asylum Seeker
UPN	Unique Pupil Number

CROYDON SCHOOLS FORUM - MEMBERS VOTING RIGHTS												
Version 3 - 2019												
Ref 6.10	Casting a vote	Academies and Free Schools	Maintained Nursery Schools	Maintained Primary School Governors	Maintained Secondary School Governors	Maintained Primary	Maintained Secondary	Maintained Special Schools	Maintained Pupil Referral	Early Years Provider	Non Schools	Overall Total
	Members voting card colours	YELLOW	GREEN	GREEN	GREEN	GREEN	GREEN	GREEN	GREEN	PINK	PINK	
	Member voting totals by category group	8	1	2	1	2	1	1	1	1	4	22
a	Only maintained primary school members can vote on primary school de-delegation			2		2						4
b	Only maintained secondary school members can vote on secondary school de-delegation				1		1					2
c	Combined voting on de-delegation for primary and secondary schools may be taken where the requirement is common for both schools. Optional - may vote depending on paper			2	1	2	1	optional	optional			6
d	Retained funds for statutory duties relating to maintained schools only is limited to maintained primary, secondary special schools and PRU members			2	1	2	1	1	1			8
e	All school members can vote on the scheme for financing schools but not academies, free school members and PVI		1	2	1	2	1	1	1			9
f	All school members including academies, free schools and PVI members can vote on any other school forum business including consultation of the funding formula	8	1	2	1	2	1	1	1	1		18
g	Non school members cannot vote on de-delegation matters relating to the formula concerning schools and early years providers or the scheme for financing schools	8	1	2	1	2	1	1	1	1		18
h	Non school members can vote on any other school forum business	8	1	2	1	2	1	1	1	1	4	22
i	Local Authority officers and all observers have no voting rights. They have PURPLE cards and do not vote											

ITEM 2

Dedicated Schools Grant (DSG) School Funding Formula Factors Review

Schools Forum – 8 November 2021

Recommendation

The Schools Forum is asked to: Agree on the formula factors to be used in the setting of the 2022/23 schools budgets set out in Table 2 below

Members of Forum allowed to vote:-

All school and academy members are able to vote. Only early years representatives from the non schools members are able to vote. Non-school members even if represented by school staff are not eligible to vote.

1. Background

- 1.1 Local Authorities receive their DSG funding based on the revised DfE National Funding Formula. The Department for Education (DfE) usually publishes indicative allocations under the NFF at a school level using the October census.
- 1.2 The schools block NFF calculates a notional allocation at a school level and then aggregates these to produce the LA level allocations. The Department for Education (DfE) have confirmed the intention to move to a 'hardening' of the individual factors between now and 2024/25.
- 1.3 Local authorities may continue to ascertain funding allocations for schools through a local formula. Schools Forum made the decision to move closer to the NFF on some factors by taking the mid-point between the previous year's factor rate and the NFF rate. This paper sets out each of the factors that are used in the Croydon local formula, the rate/amounts in the NFF, the rates at the midpoint between the two and any other options for each factor agreed.
- 1.4 The schools block is ring-fenced in 2022 to 2023, but local authorities can transfer up to 0.5% of their schools block funding into another block, with the approval of their schools forum. However, there is no request to transfer between blocks at this time.

2. Provisional funding allocation

- 2.1 The NFF provisional allocation for 2022/23 is below in Table 1. The funding is an indicative allocation and subject to change following pupil numbers adjustments after the October census. Final allocations have in prior years been issued in late December. The movement shows an indicative increase of £5m from the 2021/22 final allocation.
- 2.2 The Teachers pensions & the teachers' pay award grants were rolled into the school's block funding in 2021/22 other than an additional allocation. In 2022/23 the grants totalling approx. £14.5m has been fully rolled into the school's block and there will be no further teachers' pension or teachers' pay grants.

Table 1 Schools Block provisional allocation 2022/23

	Total 2021/22 final allocation	Provisional funding in 2022/23	Movement
Schools block allocation	£281,312,962	£286,333,669	£5,020,707

3. Formula factors

The formula factors used in Croydon which received Schools Forum approval at the meeting of 4th October 2021 are summarised here in Table 2.

Table 2 Formula factors used in Croydon 2021-22

Para No.	Formula factor	Approval type -2022/23
3.1	Minimum per pupil funding	To note (compulsory factor and rate)(Need to add a row for split site
3.2	Age weighted pupil unit	To note (compulsory factor and local rate)
3.3.1	Deprivation - IDACI	To agree to continue to use as a method of calculating deprivation; To agree rates to be used (compulsory / discretionary)
3.3.2	Deprivation - FSM	To agree to continue to use as a method of calculating deprivation; To agree continue to follow NFF rates (compulsory / discretionary)
3.4	Low prior attainment	To agree (optional / discretionary)
3.5	English as an additional language	To agree (optional / discretionary)
3.6	Looked after children	To agree (optional / discretionary)
3.7	Lump Sum	To agree (optional / discretionary)
3.8	Mobility	To agree (optional / discretionary)
3.9.1	Private Finance Initiative - RPI	Compulsory factor as have one but with an (optional / discretionary)
3.9.2	Private Finance Initiative – base rate increase	To agree (optional / discretionary)
3.10	Minimum Funding Guarantee	To agree (compulsory)
3.11	Growth	Criteria for growth agreed SF 5th October 2020
3.12	Split Site	To agree (optional / discretionary)

3.1 Minimum per pupil level funding

Minimum per pupil funding level is set by the NFF to ensure that each pupil attracts a basic level of funding thus ensure that if no other factor is relevant that there is a minimum level each pupil at each school phase should be funded for.

Table 3 Rates for Minimum per pupil level funding

School phase	NFF & Croydon rate per pupil 2020/21	NFF & Croydon rate per pupil 2021/22	NFF & Croydon 2022/23 rate per pupil	Variance
Primary school	£3,750	£4,180	£4,265	£85
Secondary school	£5,000	£5,465	£5,576	£111

3.1.1 Schools Forum are requested to note the mandatory minimum per pupil level funding rates for 2022/23.

3.2 Age weighted pupil unit (AWPU)

The funding formulae will calculate our rate of AWPU **after** all the other factors amounts have been allocated. The amount will be dependent on our final allocation from the DfE in December. The AWPU rates for prior years are below. Our initial modelling of the indicative allocations shows an expected increase in the AWPU rates for 2022/23.

Table 4 AWPU rates

School phase	2020-21 rate per pupil (@NFF/local midpoint)	2021-22 rate per pupil (@NFF/local midpoint)	2022/23 proposed rate per pupil	AWPU at NFF rates	AWPU at midpoint rates
Primary (Yrs R-6)	£3,396.13	£3,734.33	TBC	£3,893.25	£3,914.34
Key Stage 3 (Yrs 7-9)	£4,389.41	£4,798.12	TBC	£5,002.88	£5,030.05
Key Stage 4 (Yrs 10-11)	£4,689.89	£5,112.15	TBC	£5,335.65	£5,365.31

3.2.1 Schools Forum are requested to note that the final AWPU can only be determined after the LA receives the final allocation from the DfE and after all other factors have been distributed.

3.3 Deprivation

This is a compulsory factor and is made up of 3 elements; free school meals (FSM), free school meals 6 (FSM6) and the income deprivation affecting children index (IDACI). Schools Forum can choose to use free school meals (FSM and FSM6) and/or IDACI.

For 2022/23 the DfE have set revised IDACI banding rate amounts. The intention is for this factor to be moved to a 'hard formula' to introduce nationally consistent factor values.

Table 5 sets out the NFF IDACI rates per primary and secondary pupil alongside the midpoint rate from the 2021/22 IDACI rate used in Croydon. Based on the rates in the table, Croydon would distribute a total of £10.8m using the NFF rates and £10.1m using the midpoint.

See Appendix A for definition of FSM6 relates to and the IDACI movements

Table 5 IDACI rates

School phase	Primary schools			Secondary schools		
	2021/22 IDACI rate per primary pupil used in Croydon	2022/23 national rate per primary pupil	Midpoint IDACI rate per primary pupil	2021/22 IDACI rate per secondary pupil used in Croydon	2022/23 national rate per secondary pupil	Midpoint IDACI rate per secondary pupil
IDACI Band F	£203	£220	£212	£284	£320	£302
IDACI Band E	£253	£270	£262	£397	£425	£411
IDACI Band D	£383	£420	£402	£512	£595	£554
IDACI Band C	£426	£460	£443	£575	£650	£613
IDACI Band B	£481	£490	£486	£670	£700	£685
IDACI Band A	£717	£640	£679	£1,015	£890	£953

(1) IDACI

3.3.1 Use IDACI as a method of calculating deprivation by:

- (a) Moving to the national average rate set by in the NFF rate per pupil* or
- (b) Moving to the midpoint rate between Croydon 2021/22 local rates and NFF;
- (c) Keeping IDACI Band 'A' the same as last year's allocation but move all other bands to the midway point;
- (d) Keeping the rate the same as last year's

(2) Free School Meals (FSM)

Schools receive funding for all FSM eligible pupils through this factor. In 2021/22 Croydon followed the NFF rates and distributed £16.7m through this factor. The rates per school phase varies for each of the two elements (FSM rates and FSM6). Based on 2021/22 school data and using the NFF rates, Croydon would distribute (£17.9m) £6.4m for FSM and £11.5m for FSM6.

Table 6 FSM rates

School phase	2021/22 rate per pupil - FSM	2021/22 rate per pupil – FSM6	2022/23 NFF rate per pupil - FSM	2022/23 NFF rate per pupil –FSM6
Primary school	£460	£575	£470	£590
Secondary school	£460	£840	£470	£865

3.3.2 Use free schools' meals by adopting the national average rate set by in the NFF rate per pupil for FSM and FSM6 – following the methodology used in 2021-22

3.4 Low Prior Attainment

This is an optional factor which Croydon will use again this year. It is a rate per pupil per school phase and is set locally. In the 2021/22 allocation Croydon distributed £14.5m through this factor. The NFF rates are higher and would result in £17.2m being distributed through this factor, offsetting reductions in Deprivation funding should the lower NFF deprivation rates be used. The midpoint would result in £15.8m being distributed. The APT tool automatically provides the number of pupils

who are eligible (based off the prior year census data). See Appendix A for definition of Low Prior Attainment and the pupils in this category

Table 7 Low Prior Attainment rates

School phase	2021/22 midpoint rate per pupil	2022/23 NFF rate per pupil	2022/23 midpoint rate per pupil
Primary school	£908	£1,130	£1,019
Secondary school	£1,524	£1,710	£1,617

3.4.1 The Low Prior Attainment agreed rate should:

- (a) Move to the national average rate set by in the NFF rate per pupil or
- (b) Move to the midpoint rate between Croydon local rates and NFF.

3.5 English as an additional language (EAL)

This is an optional factor but has been used in the Croydon local formula. This rate per pupil per phase had been set locally. In the 2021/22 allocation Croydon distributed £4.9m through this factor. Using the NFF rate for 2022/23, due to significantly lower pupil numbers shown as EAL in the APT (from 7,741 to 2,648), £1.7m would be distributed. At the midpoint rate, £1.68m would be distributed.

Table 8 EAL rates

School phase	2021/22 Local rate per pupil (@NFF/local midpoint)	2022/23 NFF rate per pupil	2022/23 midpoint rate per pupil
Primary school	£539	£565	£552
Secondary school	£1,503	£1,530	£1,517

3.5.1 The English as an additional language factor rate should:

- (a) Move to the national average rate set by in the NFF rate per pupil or
- (b) Move to the midpoint rate between Croydon local rates and NFF.

3.6 Looked after Children

This rate per pupil per school phase is set locally. Using the 2021/22 local rate Croydon distributed £167k through this factor. There is no guided NFF rate. Based on present figures in 2022/23 the distribution would be marginally lower at £165k.

Table 9 Looked after Children rate

School phase	2022/23 proposed rate per pupil	Number of pupils
Primary school	£500	145
Secondary school	£500	192

3.6.1 The Looked after Children factor should:

- (a) Be maintained at the existing rates per pupil and
- (b) Be de-delegated/allocated to the funding to Virtual Schools team directly

3.7 Lump Sum

Each school receives a lump sum. In 2021/22, the local lump sum per school was £140,000 and resulted in a distribution of £15.3m. The published NFF rate is £121,300 for Primary schools and £130,650 for Secondary schools. Using the NFF would result in a distribution of £13.4m and at the mid-point rate it would be £14.3m. The 2021-22 cost using a £140k allocation per school costs £15.260m. Since all schools are paid the lump sum factor at the same rate regardless of size this has been the way in which Croydon has supported its smaller schools.

Table 10 Lump sum rates

School phase	2021/22 Local rate per school	2022/23 NFF rate per school	Midpoint rate per school
Secondary school	£140,000	£121,300	£130,650
Primary school	£140,000	£121,300	£130,650

3.7.1 The lump sum factor should:

- (a) Be decreased to the NFF rate of £121k for 2022/23
- (b) Be set at the midpoint rate between Croydon and NFF e.g. £130,650 or
- (c) Be retained at the higher rate as per prior years of £140,000 per school

3.8 Mobility

The mobility factor allocates funding to schools with a high proportion of pupils who first join on a non-standard date. Mobility funding was previously allocated on the basis of historic spend. However, for 2020/21, the DfE developed a new methodology that enables calculation of allocations of this funding on a formulaic basis. Rather than relying on a single census, the methodology involved tracking individual pupils using their unique pupil ID through censuses from the past 3 years. If the first census when the pupil was in the school was a spring or summer census, they are considered a mobile pupil. To be eligible for mobility funding, the proportion of mobile pupils a school has must be above the threshold of 6%. A per pupil amount will then be allocated to all mobile pupils above that threshold.

See Appendix A for definition of Mobility and the schools and school phases impacted

Table 11 Mobility rates

School phase	2021/22 Local rate (@NFF/local midpoint)	2022/23 NFF rate	Midpoint rate per school	NOR eligible	How many schools would be impacted
Primary school	£807	£925	£866	184	28
Secondary school	£1,202	£1,330	£1,266	61	5

3.8.1 The Mobility factor should:

- (a) Move to the national average rate set by in the NFF rate per pupil or
- (b) Move to the midpoint rate between Croydon local rates and NFF.

3.9 Private Finance Initiative

Croydon has one PFI school and therefore uses this factor. The purpose of the factor is to fund the additional costs to a school of being in a PFI contract. Following a schools' block working group meeting we are expecting more information on this factor from the school/Trust involved and so need to return to this at a future meeting.

3.9.1 The PFI factor should:

a) Be considered at the November meeting of Croydon Schools Forum

3.10 Minimum funding Guarantee (MFG)

MFG protects schools' budgets from large changes in funding based on factor changes. It protects on £/per pupil basis but does not protect against a fall in pupil numbers.

In 2021/22, the DfE changed the levels at which the MFG may be applied in local formulae to between +0.5% and +2.0%. All of Croydon schools have reached and exceeded these increases using the NFF rates. Proposed to keep the 2021/22 limit of +0.5% in 2022/23.

Table 13 MFG rates

Year	MFG	Using NFF rate for all factors
2016/17	£11,425,730	
2017/18	£3,861,329	
2018/19	£2,362,522	
2019/20	£1,143,179	
2020/21	£670,987	
2021/22	£87,337	
2022/23	TBA	£101,196

3.10.1 Schools Forum are requested to agree to set the MFG at +0.5%.

3.11 Growth

The criteria for growth funding for schools was reviewed and approved by Schools Forum on 5th October 2020. The rates for various parts of the growth fund will be applied to the schools that meet the growth criteria and have been confirmed by the Schools Admissions Team.

Table 14 Growth rates

Year	Growth
2017/18	£3,002,894
2018/19	£3,365,680
2019/20	£2,279,811
2020/21	£1,708,617
2021/22	£1,914,299
2022/23	£1,369,581

3.11.1 Schools Forum are requested to note the above and agree that this sum be allocated to schools that meet the growth criteria.

3.12 Split site factor

The split site factor was previously part of the growth fund and at the meeting of October 4th 2021 Forum agreed that it should, once again, become part of the main formula. There is an associated paper [ITEM 3] at this meeting to explain the possibilities of allocating the split site factor.

3.12.1 After considering paper 3 the split site factor should:

- a) Be allocated according to Croydon's previous methodology used when this factor was part of growth fund - £35k per school.**
- b) Be allocated according to the criteria used by Waltham Forest - different rates for primary and secondary;**
- c) Be allocated according to the criteria used by Southwark Council - £60.4k per school;**
- d) Be allocated according to the criteria used by the London Borough of Sutton & Royal Borough of Kingston upon Thames - £50k per school**

<p>Recommendation that the Schools Forum agree on each of the formula factors to be used in the setting of the 2022/23 schools budgets set out in Table 2</p>

Appendix A

FSM6 - Pupils who are identified as FSM6 eligible (pupils who have been entitled to FSM at any time in the last 6 years) as taken from the previous January census.

IDACI - The IDACI element of the deprivation factor is based on the IDACI dataset for 2019, which is published by the Ministry for Housing, Communities and Local Government (MHCLG). IDACI is a relative measure of socio-economic deprivation—an IDACI score is calculated for an LSOA (an area with typically about 1,500 residents) based on the characteristics of households in that area. The IDACI score of a given area does not mean that every child living in that area has particular deprivation characteristics—it is a measure of the likelihood that a child is in a household experiencing relative socio-economic deprivation. LSOAs are ranked by score, from the most deprived LSOA, with the highest score, to the least deprived LSOA.

The IDACI measure uses 7 bands (A to G where A is the most deprived) and different values can be attached to each of the 6 bands A to F. Different unit values can also be used for primary and secondary schools in each band.

Low Prior Attainment - The LPA factor acts as a proxy indicator for low level, high incidence, special educational needs and is measured as such for primary and secondary pupils:

1. primary pupils identified as not achieving the expected level of development in the early years foundation stage profile (EYFSP).
2. secondary pupils not reaching the expected standard in KS2 at either reading, writing or maths—an individual weighting is applied to each year group from years 7 to 10 when calculating secondary LPA to reflect the higher levels of low attainment under the new testing regime

Mobility - This factor pertains to pupils who first appeared in either the January or May census return at their current school (the one they are on roll with in the October census) in 2017 or later. This is for pupils in reception only, those first appearing at their current school in the May census are classed as mobile.

With this factor, there is a 6% threshold and funding is allocated based on the proportion above the threshold (for example, a school with 8% of pupils classed as mobile will attract pupil mobility funding for 2% of pupils).

How PFI is calculated in the NFF - Premises funding will continue to be allocated at local authority level on the basis of actual spend in the 2020-21 APT, with the PFI factor increasing in line with the RPIX measure of inflation (1.56%) to reflect PFI contracts.

ITEM 3

Dedicated Schools Grant (DSG) School Funding Formula– 2022/23

Split Sites factor

Schools Forum – 8 November 2021

Recommendation

The Schools Forum is asked to:

Adopt Option 1 having considered all the alternatives presented in this paper

Members of Forum allowed to vote: -

All school and academy members are able to vote. Only early years representatives from the non schools members are able to vote. Non-school members even if represented by school staff are not eligible to vote.

1. Introduction

- 1.1 'Split sites' is an optional factor used to support schools that have additional unavoidable costs because the school buildings are on separate sites. The guidance states that the allocations must be based on objective criteria for the definition of a split site and for how much is paid.
- 1.2 This paper is therefore a follow up request from Schools' Forum regarding the split site criteria and funding awarded to qualified schools. It provides an additional insight into the current split site criteria agreed by Schools forum on 5th October 2020 and assesses that in line with the ESFA guidelines.
- 1.3 The paper seeks to evaluate the budget implications of the current criteria as well as funding awarded to schools when compared with four other London Local Authorities for possible best practices.
- 1.4 A look at Table 1 and appendix (a) provides some useful data analysis which may help facilitate the decision-making process at the next meeting in deciding on either:
- (a) To keep the current 3 criteria + additional criteria [d] and keep funding at £35k per site;
 - (b) Or to amend one of the above or both;

The report therefore compares Croydon's position against four other local authorities as shown in table 1 and appendix (a) below.

Table 1

Local Authority	Cost per site - Primary	Number of schools	Cost per site – Secondary*
Croydon Council	£35k	4	£35k
Waltham Forest	£35k	21	150k*
Southwark Council	60.4k	6	
Sutton & Royal Borough of Kingston	50k	3	

*See appendix (A).

2. ESFA guidance :

2.1 ESFA allows this factor to be determined by Schools' Forum but examples include:

- a) The sites are a minimum distance apart, as the crow flies, and the sites are separated by a public highway;
- b) The school has remote playing fields, separated from the school by a minimum distance, and there is no safe walking route for the pupils.
- c) A percentage of staff are required to teach on both sites on a daily basis, to support the principle of a whole school policy, and to maintain the integrity of the delivery of the national curriculum;
- d) A minimum percentage of pupils are taught on each site on a daily basis
- e) the provision on the additional site does not qualify for an individual school budget share through the DSG

2.2 Allowable ESFA methods of calculation:

- a) Agreed lump sum payment;
- b) Agreed per-pupil rate;
- c) Agreed rate per square metre of the additional site;
- d) Values for primary and secondary schools may be different

2.3 ESFA online guidance:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/945784/Schools_Operational_guide_2021_to_2022_V4_.pdf

3. Croydon Current criteria

3.1 As shown in Appendix A below Croydon has three main criteria currently in place that applied at the time when these payments were previously made through Croydon's growth fund. These arrangements have been in place for many years and are approved annually by Schools Forum when reviewing growth fund criteria. Schools are expected to meet all the set requirements to qualify for the split site award. Appendix A shows that four schools currently meet the requirement hence the overall financial burden on the school's block is presently £140k. Following a previous Schools Block working party we also suggest the inclusion of new criteria [d] highlighted in Appendix A below

4. Waltham Forest criteria

4.1 Significant number of schools qualify since it appears Waltham Forest has adopted just one main criterion. This might indicate why 21 schools qualify - costing the schools block £744k.

5. Southwark Council and Sutton & Royal Borough of Kingston upon Thames

5.1 Southwark Council also use one main criteria as shown in Appendix A. This was adopted from the ESFA guide. Six schools qualified and are paid £60.4k each - making a total of £362.4k.

5.2 Sutton and Royal Borough of Kingston has four criteria like Croydon Council hence only three schools qualify. The overall cost to the local authority is £150k as each split site attracts a funding of £50k.

6. Conclusion

The decision to keep or amend the current criteria should be considered in line with the following underlisted observations from the benchmarking exercise:

- (a) The criteria set by Council is in line with the ESFA guideline published in the operational guide. It is clear and transparent and includes all the trigger points listed in the operational guide.
- (b) There appears to be direct correlation between number of criteria and number of qualified schools hence less budget pressure on the school's block with high number of criteria.
- (c) Amount payable by Croydon per split site appears low when compared to the four other local authorities listed in this report.

Recommendation that the Schools Forum Adopt Option 1 having considered all the alternatives presented in this paper.

Appendix A

Four other Local Authorities – Split Site Analysis

	Criteria	Funding per site	Cost implications
Option 1 Croydon	<p><i>Possible criteria:</i></p> <ul style="list-style-type: none"> a) The two or more sites must belong to a single school that by definition has one DfE number; b) The two or more stand-alone sites are not physically connected or directly accessed from another part of the school; c) Each site has its own reception that is consistent in appearance with a reception for a one site school. Over 18 % of the school's curriculum for pupils in the age range R to 11 are taught on the site; d) The provision on the additional site does not qualify for an individual school budget share through the DSG 	<p>a) One rate, regardless of school phase determined as part of Croydon formula funding each year. Factor relates to the extra staffing/contract costs of running an extra school office/boilers etc.</p>	<p>Presently four (4) schools costing £35k per school totals £140k. This is the amount currently allowed and less than what was given in previous Croydon formulas</p>
Option 2 Waltham Forest's	<p>The two or more sites must belong to a single school with two separate receptionsⁱ</p>	<ul style="list-style-type: none"> a) Primary School rate per site £36k; b) Secondary School – Second site building footprint more than 50% of main site £140k; c) Secondary School – Second site building footprint less than 50% of main site £70k 	<p>Twenty- one (21) schools £744.5k. (This cost means less available through AWPUs)ⁱⁱ</p>
Option 3 Southwark Council	<p>Schools are awarded lump sum of £60,400 if they operate on two sites separated by a public road carrying through trafficⁱⁱⁱ</p>	<p>Agreed lump sum payment of £60.4k to each school either primary or secondary school.</p>	<p>Six schools are currently paid £60.4k each making a total cost of £362.4k</p>

<p>Option 4</p> <p>London Borough of Sutton & Royal Borough of Kingston upon Thames</p>	<p><i>Current criteria</i></p> <p>a) The school has a single DfE number and has two or more distinct campuses that do not share a common boundary and where travel between the sites requires access via a public high way.</p> <p>b) Teaching and learning unavoidably occurs on both sites and involves a significant number of pupils and where it is necessary to maintain permanent staffing on both sites.</p> <p>c) Funding is not already provided for additional costs through a separate mechanism.</p> <p>d) The creation of any new split site will require prior agreement with the local authority to ensure it is unavoidable in delivering core education. .</p>	<p>Agreed lump sum payment of £50k to each school either primary or secondary school.</p>	<p>Three schools are currently paid £50k each making a total cost of £150k</p>
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- ii Just one of the criteria used
- ii Highlighting by Schools Forum steering group

Schools Forum

SCHOOLS BLOCK WORKING GROUP minutes

Date: 12 October 2021

Time: 10am

Via "ZOOM"

ATTENDEES

Patrick Shields (PS) CHAIR	St Mary's RC High School	√
Markie Hayden (MH) Vice Chair	Norbury High Schools for Girls	√
Leonore Fernandes (LF)	St Joseph's RC Junior Head Teacher	x
Tyrone Myton (TM)	Shirley High School Performing Arts College	√
Clare Wingrave (CW)	Oasis Academy Byron	x
Dave Winters (DW)	Trade Union	√
Soumick Dey (SD)	Riddlesdown Collegiate	x
Jolyon Roberts (JR)	Chair of Schools Forum	
Charles Quayle (CQ)	LBC Finance Manager	√
Shelley Davies (SDa)	LBC Director of Education	√
Phillip Herd (PH)	LBC Interim Head of Finance	
Denise Bushay (DB)	LBC Head of Service - School Place Planning and Admissions	√
Ben March (BM)	Chief Financial & Operations Officer Step Academy Trust	x
Adam Browne (AB)	Regional Director of Oasis Community Learning in London & South East Primary Academies	√
H. Beck	Minute Taker	√

1:	Welcome	
	The Chair welcomed everyone to the meeting. Vivienne Esparon has resigned.	
2:	Minutes of last meeting 29 June 2021 and update on Actions	
	Minutes to be agreed.	
3:	PFI – Ashburton Private Finance Initiative – Oasis Academy Shirley Park	
	The purpose of the paper is to note the outcome of the benchmarking exercise and for approval of the uplift by the Schools Forum. DB informed the members that the paper relates to the benchmarking exercise undertaken by the facilities management for the Ashburton PFI. In line with clause 27 of the project agreement 'the contractor shall undertake a benchmarking exercise at its own cost' within 6 months of the market testing review. The facilities	

manager is Vinci and they appointed Artelia UK to prepare the report. This report was received by the LA who then requested further evidence on why there should be an uplift; why is was below the market average value and what extra was provided for the uplift. The response from Vinci clarified that the uplift was only to cover service costs provided through the agreement. An extension of 6 months was negotiated in relation to the benchmark uplift and a request has been submitted for a further 6 months extension to the 31 December 2021. Discussions continue internally with procurement colleagues regarding PFIs managed by the LA and any options to reduce costs.

Without the agreement of the uplift by December 2021, market testing would be the next step and this would be costly, incur legal fees, it would be lengthy as well as variation of the contract and unlikely to achieve value for money. There is no guarantee a cheaper provider could be found. The last benchmarking exercise in 2016 did not result in any further increase of costs.

There are 4 funding streams to this PFI contract:

- DfE pays the majority of the funding
- LA paid nearly £100k in 2021
- Oasis Shirley Park paid nearly £900k of the estimated costs
- Schools Block contributed just over £600k agreed by Schools Forum in 2019/20

The result of the funding paid out for the PFI contract which ends in 2034 is £2,796,524.

PS remembers that the vote in Schools Forum was very marginal in favour of this payment and that the main crux was that students in Croydon schools are paying nearly £10 per head to support Oasis with this.

AB thanked the meeting for the support provided to Oasis Shirley Park through this process. Historical benchmarking has been taking place where there was additional funds requested to pay towards this. Oasis Academy have reviewed the level of contribution being requested from Schools Block and they will also be asking for a reduction this year. The figure is not known at present but will be sent to the **DB** by the end of this week – **ACTION**

Q1: JR thanked **DB** for her paper. Has the uplift being requested from the PFI company or from Oasis, or are we just unilaterally offering this;

A1: DB said this is requested from Vinci facilities management. She has tried to get the school's view on the uplift but no formal response has been received. As an LA we are minded that this uplift does not cause any deficit to the school's budget and impact the education and learning of the young people;

Q2: JR questioned whether it was 14% more for the same services (everyone is suffering cost increases) and could not think of a more expensive provider than Vinci. How were they sourced;

A2: AB said the standard of service provided by Vinci is variable. The site manager at the moment is better than previous managers and he feels that the quality of service received is not value for money. He is disappointed that every child in Croydon pays £10 per head towards this PFI, it is appalling. This contract is not good value for money. He does not know where value for money could be achieved

or whether either the school or the company that owns the freehold could make this decision.

DB was surprised to hear about the variability of the service as this has not been flagged during either the monthly or the termly strategic meetings that the LA attends. Over the Covid period there was a lot of praise for the amount of work carried out to maintain the grounds and the site. In terms of testing the market, in line with the project agreement in place, Vinci would then go and test the market.

JR said this contract should never have been signed in the first place.

DB said the LA does not have the money to test the market but that there is a P5 forum the LA attends to learn from other projects. The overriding message from this is that it is not cost effective.

JR pointed out that the purpose of the break clause should not cost anything at this point.

DB reminded members that this was not an LA initiative but a government directive. The overriding message is that it would cost more to end the contract than to continue it but the LA can investigate further. **ACTION**

Q3: PS asked how this links to the £600k+ paid last year, is this a completely separate pot;

A3: DB said the costs of running the PFI is over £2,5m, the DfE contribute £1,798m, therefore the shortfall has to be made up from the 2 other funding streams.

CQ said the increase is £32k and out of this £28k is the schools responsibility, the LA take £4k. The Schools Block is asked to cover the £28k.

Q4: PS looked at the recommendations and asked if the request is for Schools Block pick up the 11.5%;

A4: CQ said no as 11.5% is covered by the LA and will make an amendment to the paper.

DB if we are to agree the uplift it would be as a whole and the 11.5% would be covered by the LA.

PS said if this was a recommendation for Schools Forum to review the amount, we would need to know this and make the recommendation on whether the amount was accepted.

DB will take this back as she can see the need that the DSG be changed to £28k and remove the bit about the LA. **ACTION**

Q5: JR is concerned that out of the 4 contributors, only 2 are contributing to the funding, albeit Oasis are about to make an offer. In terms of the 14.1% uplift charges, does the DfE not have to come up with the 14.1% of their sum as well;

A5: DB agrees with JR and said over the last 4 years of the contract, the DfEs contribution has not changed. The LA have been lobbying the government about this contribution towards the PFI and this has not changed.

PS pointed out that the Schools Block contribution has increased by 400% from £150k to £600k. There is growing discontent in this Forum for supporting this.

JR said that the recommendation needs to change on the paper and Forum will have to hear what Oasis are prepared to offer on this once they come up with a figure.

DW said DB has surpassed the high expectations of her and provided an informative paper. Forum prides itself of scrutinising expenditure within the education section and that DB's paper is a prime example of thorough scrutiny being exercised. A decision cannot be made until the additional information offered is forthcoming. He feels that the mistakes and errors made in the past by national and local politicians should not allow the students and staff at Oasis to suffer the consequences of bad decisions made in the past. There is the ability for Oasis to come back regularly and ask for a review of the contributions made to cover this agreement. Any school in the borough who are in difficulty can approach Forum and ask for consideration to be made for their particular circumstances.

PS said the reality is that this is a very divisive issue.

MH said the discontent with Vinci facilities management should be investigated. She referred to 2.7 of the paper and said every school is facing these issues. Oasis need to come with some compromise. It could be expensive but she feels that in the long run it might be cheaper to get someone else, especially if there is a breakup clause.

Q6: TM asked if Schools Blocks is legally obliged to make the PFI payment to Oasis and is it a legal or moral obligation;

A6: PS said his legal understanding of the guidance is that PFI is one of the factors, however, we can decide whether to recommend contributing either 1p or £600k;

Q7: TM touched on MH's point about discontent with the service being provided by Vinci, yet it sounds like there is going to be an increase of £28k in the service, people are not happy about, is this correct;

A7: AB reiterated that it was around who the person is leading the site and said the current site manager has been good and proactive and is a significant improvement from previous site managers. He does not think it is value for money or whether a better service could be achieved and he is concerned about the sustainability if the current site manager is absent.

TM said as the increase is disproportionate towards this group, and it is a contentious issue and decision to make, but what is being requested of this group has gone up and up. If you look at this from an external point of view, bearing in mind the lockdown, costs going up and schools having to be creative in finding ways to make those savings, should Oasis who are a multi-academy not do more to reduce the impact this is having on other children in Croydon, as they are subsidising a PFI that is of no benefit to schools. There needs to be a little bit more from Oasis as this is not a bottomless pit.

Q8: JR referred to the proposed uplift of 14.1% and said this equates to Vinci getting £231k to clean the school, run the lettings etc. which is a lot of money. He asked how many site staff are employed;

A8: AB said the site staff were employed directly by Vinci.

Q9: JR said his instinct is to go to the market and undertake our own exercise to see what the costs could be. He asked **DB** if there was a specification;

Q9: DB said this was carried out by Vinci therefore the LA does not have a specification as such. The LA can challenge the exercise but is not sure the LA can carry out its own market testing – she will double check this. **ACTION**

CQ said from Finance perspective, let us assume that there are no more local factors and we have gone into the NFF, the LA would have then looked at the cost of PFI and put everything into a pot. The school would still get something. Therefore still on the local factors this issue is showing up. If we moved to NFF the DfE would still take the money from the school, recalculate and the outcome would be as it is now. He would like to put a paper together involving all London boroughs with a PFI to look at what is happening so that Schools Forum are more informed. **ACTION**

PS said having spent a considerable amount of time on this agenda item the only place we have got to is that there is discontent and a lack of clarity. Therefore a paper needs to come back with definitive figures.

Full and complete PFI paper (as an Agenda item) for presentation to the 18 November 2021 Schools Block meeting. **AB** to attend the meeting. **ACTION - CQ.**

JR reminded members of the group that if for example, there was a swathe in cuts to this figure, it is almost certain that the MFG would cut in for that school.

PS said Schools Block and Forum's overall objective over the last 5/6 years, was to do everything by reducing and letting the MFG bring everything back.

JR agreed and said we have been tremendously successful in this.

MH - investigate if there is a cheaper option for the facilities management of the school. **ACTION – CQ/DB**

JR asked is it 14% of £231k. How much of the £2,796,000 is for facilities. He knows from the past that this amount can be split into 2 parts – one to capital and one to services. It would be useful to split this as when the facilities costs rise, it is Schools Block who are asked to pay for this. **ACTION – CQ**

AB agreed with the sentiments and said Oasis is looking at a request of a reduction in the amount from the Schools Forum. He said £10 per head from every child in the borough is not acceptable. The school's solicitors are revisiting the contracts to see if there is anything Oasis could do to avoid this annual situation. Oasis do not feel comfortable asking for the money. He will send the figure to **DB**. **ACTION**

TM would prefer if we made a decision to either accept what the amount is and pay it and stop having the same conversations on a yearly basis. It is hard to believe, coming from a large academy trust, that this conversation is being discussed in this forum with schools that are not academies or borough run schools. He would think there are the resources within the academy to deal with that academy chain.

4:	Dedicated Schools Grant (DSG) School Funding Formula – 2022/23 Formula Factors	
	<p>PS informed the meeting that at the Schools Forum Pre-Meet, the previous philosophy of taking the mid-point at each occasion has helped with the MFG and a number of other issues. This has meant that, some of the factors for the most vulnerable groups over the last couple of years, £millions have been redirected from far more vulnerable groups into AWPU. This does not mean we should change our thinking but in our consciousness, as this could have an impact over time.</p> <p>CQ referred to the Background information in Point 1.</p> <p>Table 1 illustrates the Schools Block provisional allocation for 2022/23. This shows there is a growth of £5,020,707 additional DSG given to schools.</p> <p>Table 2 indicates all the formula factors requiring approval.</p> <p>PS said in the last couple of years Forum tried to move close to the NFF.</p> <p>3.3.1 – Deprivation – IDACI</p> <p>Q1: TM asked what is the difference between the bands; A1: JR said the bands represent the post code level analysis of where the young person lives (the most deprived wards) and this can be located in the online IDACI tool; Q2: TM asked how much is the budget for schools this year and is it different from last year; A2: CQ said the total budget moved up by £5m but this figure may change in January 2022 as the census update is being waited on.</p> <p>(c) Keep the rate as last year – unanimous recommendation.</p> <p>3.3.2 – Deprivation – FSM</p> <p>(a) Move to the national average rate set in the NFF rate per pupil.</p> <p>3.4 – Low Prior Attainment – LPA</p> <p>Q3: TM asked if assessments are not being carried out at the end of KS2, how would you generate the information to use at KS3 and KS4. How is LPA being quantified; A3: CQ referred TM to Page 15 of the Schools block national funding formula and said this is how the DfE works it out.</p> <p>DfE guidance: Schools block national funding formula: technical note July 2021</p> <p>DW thought that in the absence of current data, there should be reliance on historical data in order to factor in this particular strand.</p>	

TM said where the point of reference, in Table 7, is being taken from, there is Covid, lockdowns and that there is no way to determine how far behind some of the children are. These children will be going to secondary school and these schools may not have the funding they need.

CQ said if the NFF was used the total would equate to £17,179,267.

(a) Move to the national average rate set in the NFF rate per pupil.

3.5 – English as an additional language

MH said we will see an increase in the number ESOL children due to recent events and whatever support is provided will be appreciated.

(a) Move to the national average rate set in the NFF rate per pupil.

3.6 – Looked after children

SDa said the Virtual School report shows the impact of funding on the children's attainment. A future discussion could involve following those children as they transition from children looked after to leaving care and how they could be supported.

PS said the quality of the reports received every year from the Virtual School give Schools Forum a mind to be supportive. This could be added to next year's paper if there is another group to be added.

Q4: TM asked if this included previously looked after children;

A4: SDa said additional funding is received for previously looked after children. This supports the staffing of all the looked after children for them to have access to an advisor.

(a) Agree to maintain the existing rates per pupil.

3.7 – Lump sum

JR reiterated that the lump sum is the only way small schools are supported. If we moved to the NFF rate, as there is no small schools factor allowed, it would affect one form entry schools.

(c) Retain the higher rate as per prior years of £140,000 per school.

3.8 – Mobility

(a) Move to the national average rate set by the NFF rate per pupil.

3.9.1 and 3.9.2 – Private Finance Initiative – PFI

Not discussed.

3.10 – Minimum Funding Guarantee – MFG

JR said this has been a victory over time. Previously we were allocating £11,425,730 in 2016/17. This year we are in the region of £100k.

There was unanimous agreement to set MFG at +0.5%.

3.11 – Growth

CQ said growth is reducing by £500k every year.

Q5: PS asked if any payments for growth disappear, as these should be legacy and time limited, therefore no need for growth for quite some time;

A5: CQ said this is up to 7 years.

PS said it would be useful for next year to see what growth all schools are getting and how long this will remain in the factors.

Split sites needs to be added to Table 2 as 3.12 as this was approved at the previous Forum. **ACTION - CQ**

Schools Block to note the above.

5: Dedicated Schools Grant (DSG) Funding Formula – 2022/23 Split Site factors

PS said it is tradition when paying split sites and this paper is asking for current arrangements to be kept.

Q1: MH asked whether this paper was paying the 4 schools £35k per annum forever;

A1: JR said that before split sites was in growth and it was a factor allowable in the formula, though it was never really to do with growth. Now split sites factor is allowed again. He feels we should keep to what we pay and not widen the remit.

MH was concerned how this would look to other schools who have been told to reduce their pan of pupil placements and still pay for split sites.

PS said this is not indefinite as the factors are reviewed every year, therefore it will be subject to annual review by Schools Block.

Q2: TM said from the conversation last time, it was an issue that it was for 6 years, then it stopped. Some schools where split sites but they were not aware of the funding and had not picked up the funding that previous schools had. There was concern that if we open “Pandora’s” box someone might come back and ask for the money. It says presently 4 schools are split sites – who is determining this and how much of that site is in use. Who is doing an audit on what a split site is;

A2: JR said this has already carried out in CQ paper. The criteria was written to stop the questions you have raised. The split site schools are, Whitehorse Manor Infant, Cypress Primary, West Thornton and Oasis Shirley Park.

	<p>DW said this paper identifies that in different LAs there are special factors and that in some LAs their split site factor is far more prominent than in Croydon. In a way like the PFI as this is different in other authorities. We have to contend with the local factors.</p> <p>Recommending Forum adopt the conclusion to pay the 4 schools the lump sum of £35k each and keep this as an annual factor at 3.12.</p>	
6:	Report on SRMAs	
	<p>PS said this paper is useful and it to note the position. This is the first time a written paper has been received on the SRMA. It will be more interesting the next time as it will show us the identified savings. Schools are encouraged to use the resource which is free of charge. The £50k has been previously set aside by Schools Block and agreed for supporting intervention for the schools who want to realise savings identified.</p> <p>JR said the 2 schools listed are maintained nursery schools. It has returned to the top of the agenda the idea that there are systemic problems with the maintained nursery schools. Another paper on maintained nursery schools will be brought to Schools Forum to talk about a strategic approach to assist them.</p> <p>PS said the paper tells us what the SRMA has identified as potential savings and a report back will show if the schools are making progress to realise those identified savings and get out of deficit.</p> <p>Meeting finished at 12.05pm</p>	

DATE OF FUTURE MEETINGS:

23/11/2021 ♦ 8/2/2022 ♦ 11/5/2022 ♦ 28/6/2022

Schools Forum
High Needs Working Group
Minutes

Date Tuesday 22 September 2021

Time: 10am – 12pm

Venue: ZOOM Meeting

Invited:

Kathy Roberts	(KR)	Head of 0-25 SEN Service
Charles Quayle	(CQ)	Principal Accountant
Jenny Adamson	(JA)	Saffron Valley Collegiate Head Teacher
Jaqi Stephenson	(JS)	Head of Selhurst Nursery & Children Centre
Theresa Staunton	(TS)	Early Years
Jolyon Roberts	(JR)	Chair of Schools Forum
Keran Currie	(KC)	SEN Area Locality inclusion project
Mark Southworth	(MS)	Consultant Lead, Locality Inclusion project
Katie Goodwin	(KG)	HT St Nicholas School
Phil Herd	(PH)	Interim Head of Finance
Bridget Hamer	(BH)	SEN Finance Officer
Roger Capham	(RC)	PACE Academy Trust
Jonathan Driscoll	(JD)	SEN Data Manager

Chair: Rob Veale **(RV)** HT Atwood Primary

Vice Chair: Lorraine Slee **(LS)** HT Red Gates

Note Taker: Bev High and Heather Beck

Agenda Item	Title	Lead
1:	<p>Welcome and Introductions Apologies: None</p> <p>RV welcomed CQ who is taking over from Orlagh Guarnori and thanked everyone for all the hard work they put into getting the papers ready for the meetings.</p>	Chair
2:	<p>Minutes of the last meeting held on 17th July 2021</p> <p>It was noted that some members did not receive all the papers being discussed today. RV apologised for this.</p> <p>TS pointed out that the agenda should always contain an Early Years SEND as a standing item.</p> <p>RV thanked the minute takers for stepping in at the last moment as Geraldine Truss had suffered a very close bereavement.</p> <p>Correction: spelling of Tuesday</p> <p>RC said he would like it noted that he was invited to the 13th July 2021 meeting and give his apologies but his name is not showing in the minutes.</p>	Chair

LS confirmed that she was elected on 19th May 2021 as Vice Chair.

Agenda Item 3.

SEN Data dashboard - JD said there were no corrections, but it was worth noting that some of the items had not been progressed yet.

Correction: Agenda Item 6

Update on Special School Funding - A2: OG change to DfE

Correction: Agenda Item 7

ACTION: change to services

Agenda Item 9

RV asked TS whether the Early Years SEN questions had been answered.

TS said they had taken the questions away and held a separate meeting.

KR said she was asked to look at two areas – Early Years Commissioning and Alternative Provisions (AP) – Saffron Valley commissioning. Neither of which sit under her management. Alternative Provisions sits under Sarah Bailey as HoS. The breakdown provided today is provided by her staff.

This is at September 2021 and as it shows that Saffron Valley (AP) has been set up as an approach to inclusion and supports a lot of work that goes on through the Fair Access Panel (FAP) and vulnerable children and young people at risk of exclusion. The work is managed through the Inclusion Support Service and will also, at some point, be covered through the Inclusion Programme that is running through Mark Southworth and the Early Intervention Service.

There are a range of provisions at Saffron Valley which include;

- KS3 for pupils who have been excluded or at risk of exclusion. The LA commissioned 48 places.
- KS4 South for pupils who have been excluded or at risk of exclusion. The LA commissioned 48 FTE places. This could equate to more children than actual places due to part-time/half-time placements.
- KS4 North for pupil who have been excluded or at risk of exclusion. The LA commissioned 54 places including 6 temporary assessment SAG places.
- Specialist Cotelands provision through John Ruskin College which look at emotionally based school refusers. The LA commissioned 40 places.
- Springboard tuition service for pupils with medical needs through John Ruskin College. Managed as needs arise and evidenced through audit, 1-2-1 or small group sessions.

Funding is for 190 places at £10k p/p or top up funding of £8k or sometimes a review through Schools Forum for those alternative education places, at agreed annual rates or through ERP for any additional funding that might be related to very complex or urgent cases that could not be predicated.

The LA funds Springboard as a commissioned service at the cost of £927k p/a for up to 93 pupils at any one time and in addition rental costs up to £108k p/a. There is a plan in place to deliver Outreach support to mainstream schools with a potential charging fee to generate an income for this piece of work. This will be managed as a traded offer.

JA said a mix up had occurred with the papers and that Item 7 in the last minutes should have been discussed. The action from Item 7 was to bring a paper to cover commissioned Speech & Language services and not the commissioned services of Saffron Valley and AP.

It was agreed by the group that the first 2 action points did relate to the Agenda item in July's minutes.

RV said the paper for the provision of Speech & Language services would be an outstanding action. This item will be added to the agenda for the next HNWG.

KR asked for an invite to be sent to Faith Brooks as she has a lot of detail that she has shared with the SEND board. The commissioning review for Speech & Language has been extended and the offer has been sent to all schools. It will be useful to see these figures.

JA informed the meeting that Saffron Valley's funding levels have stayed the same for many years and last year there would have been an underspend, because of the impact of Covid. It is really clear from the DfE that the guidance is not to touch AP budgets, as we are coming out of the pandemic. In Croydon they have been very clear that there are savings to be made from the PRU. A significant saving could be made by combining at least two of the sites as they are not fit for purpose. One of the sites is a rented provision which is leased from someone who is subletting it from the Whitgift. This lease has expired.

KR said we should explore these areas for potential savings.

KR said she will not present the papers but is happy to discuss the meetings that had gone on outside of the HNWG. She met with TS and JS and they looked at the Early Years position in terms of provider views etc. JS has drafted a paper that could come to this group. What we do not have alongside it is the element from the service's perspective, so that needs to be added to give it a completed position. Denise Bushay is coming to the next HNWG to update on the overall strategy.

	<p>KR to circulate JS the draft paper on Early Years with the added missing elements for discussion next time.</p> <p>TS asked if it was possible to have a High Needs 'dictionary' of the acronyms used, as well a list of all different providers around High Needs.</p> <p>KR said this is possible and it could be a detailed catalogue of everything Croydon commissions from 0-25, as not all the service providers sit under her area.</p> <p>TS said it would be useful to have the additional service providers showing which area they sit under.</p> <p>KR said other areas do receive High Needs funding and at the moment the group does not have oversight of this spending and this needs to be 'pulled in' so the group are fully aware of what is being spent in other areas.</p> <p>RV said asked if we also find out who at the council is working in what areas. Could this be completed before the next meeting?</p> <p>KR said this would be very timely as Shelley Davies has now been appointed as permanent director and she is consolidating her team below her.</p> <p>ACTIONS:</p> <ul style="list-style-type: none"> • Add SALT Commissioning to the next HNWG agenda • Send an invite to Faith Brooks • Compile a High Needs dictionary of acronyms and different providers for High Needs funding, including providers from other areas – KR • Circulate Early Years paper - KR 	
3.	Final Close Out of Previous Years Return	Charles Quaye
	<p>CQ said the Needs Block Final Outturn sent out to schools had not been presented to the HNWG.</p> <p>2.1 Refers to the DSG awarded to High Needs for 2020/21 which was £61.506m. The Education and Skills Funding Agency (ESFA) later reduced the initial allocation by £102k to £61.404m. This was expected.</p> <p>3.1 The reason why the LA could not come in line with the recovery deficit plan was that a few schools were paid late. The schools were St Nicholas, Priory Special School, St Joseph's Specialist School, Red Gates School and Harris Federation and small miscellaneous others. The LA were not anticipating to pay these funds which had arrived after quarter 3.</p> <p>3.2 Shows that the over spend deficit has increased.</p>	

Chart (a) shows quarter 4 of 2018 and the deficit of £13m. This keeps rising although the in-year trend is improving. The last minute payments affected the LA reaching its target.

The reasons for the over spend are shown in Appendix A as follows:-

- Line no. 3: Shows a £3m over spend. More money should have been allocated to the special schools budget to rebalance it. This was not done at the beginning of the financial year. All these students would have gone to independent placements which would have cost the LA £75k per child against our special schools which are costing about £35k. The LA is saving about £40k per child by keeping them in its mainstream special schools.
- Line no. 5: Shows an underspend of £94k. At one point independent school were £4m overspent. The High Needs team have done extremely well convincing parents to keep their children in mainstream special schools.
- Line no. 8: Highlights a problem as the government extended the age range for children to be in education. Previously the young people moved to Adult Services at 19 years but are staying in education until 25. The DSG Block is not reflecting the change in education. There were no additional funds allocated for this age extension which is squeezing the budgets. The FE College spend is increasing. It will be a trend for the future until the government rebalances the block to reflect a change in policy.
- Line no. 14: Was put in place to deliver some of the SEN strategies. Due to a delay in implementation there was an underspend of £599k.

RV said a discussion took place at the Pre-Meet about concerns that we are living beyond our means. As a group of professionals in term of Schools Forum, we have really got to get a grip on the over spend and work hard as a team to do that.

Q1: RV: referred to Line no. 12 and asked about the £500k over spend for Beckmead School.

A1: CQ: stated that at the start of the financial year the forecast is very accurate. The reason why the LA did not come into budget is for two reasons:-

1. The LA are responsible for picking up the census data from the LLR report and then they submit this to the ESFA. If you are a maintained school that process is easy as the LA have the data. Beckmead became an academy and it is believed they had administrative issues at the time, but they still expected the LA to submit their numbers to the government on their behalf, as though they were a maintained school. So they did not provide the data. There is no evidence that Beckmead submitted the names. If they were a maintained

school this would not be a problem, but as they are an academy, place funding is paid by the ESFA directly. There were unstated numbers submitted directly to ESFA and this became a problem, therefore the LA needs to approve £320k. According to the operational guide, when there is a dispute in place numbers, it is for the parties to negotiate. The LA have written to the ESFA about the place numbers which were unknown at the start of the financial year. This was not resolved by the end of the financial year so the LA accrued £320k;

2. The other reason is that the LA make another payment of £200k to Beckmead for the Outreach Project.

RV said he was aware that CQ was new to the role, but going back to using some of the principles of an H/T; by absolutely knowing who is being paid, when they are being paid and why they are being paid, is vital. Under this process every payment makes up part of this larger deficit. He will really be pushing for some real clarity about what we are paying for. If some of these payments can be resolved then a few of these translates into a million very quickly. This comes back to that list of providers who we are paying.

JR said if Outreach at Beckmead is as described, it seems that the Outreach funding should have been budgeted for in Line no. 23 and that maybe this is where the confusion has occurred. Going forward this needs to be recorded so we do not lose track of this.

Q3: JR: When we signed the contract for Beckmead, how long was it for?

A3: CQ Said that finance was very robust with their payments and shared the spreadsheet showing the payments due/made to Beckmead. He wanted to reassure the group that as a qualified accountant he was not making unnecessary payments.

JR said he was not questioning CQ's qualifications. If there was Beckmead Outreach then this should be inserted on spreadsheet as a separate line. Beckmead's 6 provisions are shown on the spreadsheet. These are items that multi-academy trusts can agree to, but it seems there is confusion about the additional amount that is payable. The Outreach is not shown on the spreadsheet. Items have been lost track of before e.g. payments to be made to settings. If the Outreach had been budgeted for on Appendix A as Beckmead Outreach we would know where it is.

CQ said he wanted to reassure the HNWG that finance were robust with their payments.

JR challenged this by saying finance was not robust on occasions as they had lost track of payments they owed to people and he said he was not accusing CQ but, this is the fifth funding item that finance had lost track. i.e.4 payments to schools for SEN pupils in

mainstream schools and the top-up payment to Beckmead. This is approximately £1.5m of payments that finance have lost track of.

JD asked about Line 8 as there was a big increase from what was forecast. Although, it was mentioned we had not received the funding from government. We still have not anticipated the change; it seems like a big discrepancy between the two and why is this so big and the increase has not been budgeted for?

CQ said this is across the High Needs Block. If you look at the trend you can see that FE Colleges costs increased, particularly in the last 2 years since the change. We can take money from special schools and put it in the FE budget but then the special school's over spend will be more. It is an historical issue that the budget is not enough and moving this money does not solve the problem.

JD said he could see that there was a 'pot' of money available and that the FE budget was shown as an over spend, to highlight the fact there was an additional age group, that now has to be funded that the money has not allocated for.

RV asked what Croydon has done to mitigate the risk of having to take from another 'pot' in the future. How have we set up the budgets so this does not become an issue next year or the year after?

CQ said that the way it is being looked at is through the council deficit strategy. When the budgets are being set in November, they are going to look at the people numbers and look at the trend and growth rate. The LA will look at the numbers to see how the funding can be shared.

RV said we will need to ensure the absolute quality of the information we are basing those assumptions on.

Q4: RV asked KR what is being done about the quality of information in that area.

A4: KR said JD is part of the process and we now have a really robust and rigorous data set around our whole SEN community. This is reviewed monthly by our SEN board. We have used the dashboard this year for our transition planning and going forward will look at some more predictive work. Submissions are coming in during the autumn term for placements and these are reviewed in January/February. There will always be add-ons at a later stage, which may be through the tribunal process, but on the whole we do know our population far better now. We also have the SEN finance board which meets very regularly and is chaired by Shelley Davis and Debbie Jones. This adds another level of challenge and scrutiny on the finance. CQ's work had been good in breaking that down and giving us school level data.

	<p>The DSG Management Plan is targeting the year's spend and this is what we focus on and report back. The ESFA have scrutiny meetings with the LA regularly. The new finance officer BH has done a lot of reporting and believes this is through things 'coming out of the woodwork' to bite us financially.</p> <p>Q5: RV asked whether any representative from Schools Forum goes to the SEN Finance Board to have a look at their work.</p> <p>A5: JR said he attends the meeting and invited RV to join him.</p> <p>TS pointed out that Orlagh Guornori always said we have to set a balanced budget and they expect to go over. Presumably when the LA looks at the figures they know they will go over i.e. FE colleges.</p> <p>Q6: TS asked with regards to Beckmead places not being submitted whether there could be a challenge to get that money reimbursed from the government?</p> <p>A6: CQ said he challenged the ESFA using the rule that if the school is an academy it is not the LA's responsibility. The ESFA responded that the money has been allocated to this area of education. Once allocated to the respective LA's in England they cannot go back to them to reclaim this funding.</p> <p>KR said they had lots of meetings around this issue. The original request from Beckmead was around £640k, but £320k was agreed.</p>	
4.	SEN Locality Project (Additional item)	Mark Southworth
Q	<p>JR said another of the lines on the Appendix A was around the SEN Transformation project. This is a big part of our strategy in moving some of problems in the High Needs Block and it is a surprise to see it underspent. Though it is understandable why this has happened, given the year that we have just had. He hopes that money rolls forward to be spent this academic year on this project</p> <p>Q7: JR said we know there are schools joining this year and the bulk September 2022. We would like to use the underspent money and the savings in other areas to increase the budget. There is £900k in the budget at the moment and it would be good going forward, if there was more to allocate, but only if savings were made elsewhere. This was the agreement so children could be accommodated in mainstream schools and that SENCOS forums could have some money to allocate to them. Money should have been saved on independent education and this should be used elsewhere.</p> <p>The project was originally 'seed' funded by Croydon but the long term strategy was to allocate savings to the project. In addition to</p>	

issue less EHCPs, to accommodate more children in mainstream and to allocate resources to these children.

A7: MS is now working with the vast majority of schools and they are in the project as of today – 80 schools. Once the money is allocated it is effectively dedicated to schools and any underspend is rolled over.

The project funds are split into two groups:-

1. Locality funding

Thornton Heath was the locality nearest to spending its budget while New Addington spent the least and had a bigger budget, based on historical spend. They used their budgets wisely.

KC said there is a high level of expertise amongst the SENCOs in New Addington and that it was useful to note the number of ELPs in New Addington. That expertise has been used to support additional children throughout the locality. Although they may not be going through an admission process for the ELPs the schools are using some elements of their time and space for children funded through locality SEN support.

The vast majority of students who get referred to the project are not given a financial award. They are supported with strategies, help and SENCOs working with each other and offering ideas and guidance.

2. High Needs Support

40% of this budget has been spent. The strategy is if the locality budget cannot support these pupils and more funds are required they will allocate funds from the High Needs budget.

The other issue is governance, as we thought it would be a good idea to use the existing SAG or ERF panels to give authority. This did not work as those panels were not used to our way of working. This has changed now and our own High Needs Panel has been set up, which includes one H/T from each of the localities, plus 2 professionals and they will be awarding the grants. The first meeting in October is expected to manage the budget next year better and keep within spending.

The amounts p/p for locality support range from £2k to just over £3.5k. This is less than what is given on an EHCP but often enough to prevent an EHCP being applied for. We have evidence to show this as in the pilot project in Coulsdon, New Addington, Selsdon and Thornton Heath last year 44% fewer EHCP were applied for.

There is was an underspend on the Inclusion and Development budget. This reason for an underspend is that it took a while to

realise what was wanted and to get the agreement of the schools and the professionals on board.

Going forward a lot of the money will be spent on SALT as there is a high demand from schools. There is the NHS provision, but not enough to support all of the students.

All the locality work is about enabling schools to better manage SEN needs students in a mainstream provision.

There is some exciting INSET going on today with a high quality EP as schools are concerned are EP provision. The project is using a private EP to train staff to work with students with a range of new diversities and spot issues and difficulties. The training will have 3 parts to it. There is an initial day of training for SENCOs, TAs and some class teachers. They will then work with some students using these strategies. There will be a follow up training session for them to speak to the EP to give some feedback about how well they have been able to support these students.

Work has been done work around transition and a Speech & Language expert has been asked to write a programme for SEND students who are moving from year 6 to year 7. TAs were trained to deliver a 5 hour induction programme for preparing for year 7s and this took place in primary schools in the summer term. This is now being followed up with another 5 hour induction programme for year 7s. Secondary TAs have been trained to deliver this. SEND have two courses, one to help pupils prepare for secondary school and another to help settle them into secondary school. The students who attended both programmes are being tracked to find out how this has supported them.

We are also working with the National Association of Special Education Needs (NASEN) offering a free session of CPD to all Croydon SENCOs. The first session is designed for H/Ts.

KC said all H/Ts should have had this information. We are working with NASEN and SEND offering every teacher and leader of SEN School programmes, free SEN training that's been brokered in partnership. We really want every school to take advantage of this.

Additional outreach work has been arranged for our schools from Redgates. We are 'toping up' the basic outreach and offering every school a consultation for a particular student of their choice. This is to empower schools and give them the tools to manage SEN students in mainstream rather than applying for an EHCP.

RV pointed out that a relatively small amount of money is making a massive difference and is having a positive effect on pupils and SENCOs.

JS said she totally endorses this outstanding work but said it must start with Early Years. If they want to keep children in

mainstream schools we must get them in the first place. She is aware that the LA are doing an Early Years review and knows Early Years is complex and there are a whole range of providers.

MS said he totally agrees with this as it is one of the biggest issues. There has been huge consternation from the heads about Early Years. This is a belief that Early Years funding is biased towards private providers and it is not getting through to schools with nurseries. Funds do seem to go through to private providers easier as schools put their bids in and they seem to be rejected more often. He said they are looking for ways to find evidence of this happening. We desperately need an Early Years review and he was disappointed to hear that this had been postponed.

Q8: JA said this is a brilliant programme, as Saffron Valley is a whole school provision and clearly do not fit into the locality model of the early intervention programme. However she asked if it were possible for their SENCOs to be involved in the Neo-diversity programme.

A8: MS said he was sure that would be possible. If JA could send details of what SVC would like to be in to KC.

Q9: JA asked if there was any mechanism for learning across the localities for them to share their approaches and learn from one another? Is there anyone doing anything similar to this in other boroughs that is being shared?

A9: MS said this is not absolutely new. We visited Nottinghamshire who are running a similar model, although we have developed it differently to Nottinghamshire. It is gaining a lot of traction. The DfE are interested in the idea and 2 LAs have shown an intense interest in it - Sutton and Camden. We have allowed them to attend all of the meetings etc.

KR said it is a really terrific model and is pleased about how it is rolling out. The Early Years aspect is being discussed and it is recognised as a priority. It is good how it all links and the localities make use of the specialist provisions within their areas. She said that if there is a lot of underspend in this project, it would need to be decided whether some funding does come back to the High Needs Block to help balance the books.

MS asked that the project be given the opportunity to use the new panel etc. He said it was a good point about working with specialist provisions within the area.

KC commented on High Needs saying though it looked like an underspend last year, this year new EHCPs to the borough are being dealt and this is a number we have not quantified yet. There could be year 7s coming into secondary school. Equally there are students who have benefited from the locality support and it is recognised from this that we will need to offer ongoing

support and statutory backup on an EHCP. The Outreach work has started with Redgates. A piece of Outreach work was done last term with all schools and what we want to make sure is that we have everyone involved in that programme. It would be beneficial to meet with all special school heads.

TS referred to the meeting that was taken away from the HNWG. The Early years funding for SEN needs looking at as we do not seem to have a budget based on the children we have. It is just a budget that has appeared over time. Also as an LA only 12% of Early Years children are in nursery classes, the majority are in the PVI sector. She is not sure what budgets are being looked at, but it would appear that PVI's get more funding as 9% are in maintained nursery schools. She is hopeful that Early Years will be included as Early Years providers, as we are talking about children who go into schools. She and her colleagues would like to be part of this.

MS said that this is a very good point and was being discussed. They are aware that there are more students in PVI than mainstream. He hopes someone will do this piece of work to look at the percentage of Early Years funding p/p either to PVIs or maintained to find out if it is fair.

TS said the funding rates are the same and discussed this with KR as these have not been reviewed for some time. We like SEN feedback at the Early Years working group and that piece of work would be really interesting. As this would include reception and year 1, which are part of Early Years as it goes up to 5. This is something she can take back to KR and the Early Years SEN Team and get the information back to MS. Early Years are allocated 0.16% of the budget.

KC said the frustration for mainstream schools with a nursery, is that they send applications to the SEN Team, which is either a request for specialist places for complex needs or funding. They go to the panel for a specialist place and there are no specialist places available, but the application is returned as a negative or a declined, not even with SEND funding. The case can be returned without even any acknowledgement of a specialist place not being available or without recognition of an individual child's complex needs and how best to support the child. Schools are looking after these children with little or no support at all as Locality support only begins in Reception year.

CQ would like to meet with KC and MS to put together a piece of work demonstrating the savings made through this strategy.

JR said that some PVIs deal extremely well with High Needs and others less well. He has couple of complaints logged about PVIs. He has a number of pupils who have arrived at mainstream school with no discernible SEN input prior to their arrival at reception. JR said that there is an Early Needs element to the

	<p>Early Years Block. What is the impact of this money on Early Years?</p> <p>TS said that this money is the 5% central spend which is retained within the LA. This is used for the Early Years SEND support Team. There is no direct payment of money paid out to support the children individually. You can ask for support and submit an application but many PVIs get turned down. JS paper highlights this is a priority and the finance is being looked at.</p> <p>JR asked what the impact of this team's work is. At the very least children are 'slipping through' that net. Is there anyway of using this more effectively. We may need to examine this as it is allocated to make this children's do not turn up at Reception without any discernible SEN work being done.</p> <p>TS said there was a massive impact with Covid and this team has not done any face-2-face work for the last year.</p> <p>JR was not happy with this and said that he would pick this up outside of the HNWG.</p> <p>ACTION:</p> <ul style="list-style-type: none"> • MS to send update on budget paper to RV • TS to take back information to KR and Early Years SEND Team regarding percentage of Early Years funding p/p either to PVIs or maintained and send information to MS • CQ, KR and MS to produce a paper demonstrating savings made through this strategy – CQ • 	
5:	Deficit Management Plan - Update	Charles Quaye
	<p>There 3 conditions attached to the grants for the High Needs and these only apply if you over spend.</p> <ul style="list-style-type: none"> • Over spend on the block and you have to prepare a deficit recovery plan • Meet with the DfE regularly to review your plan. Next meeting is on 29 September 2021. • Report to Schools Forum with a paper <p>The paper being presented here is part of the grant conditions.</p> <p>We are reporting to Schools Forum that the High Needs Block overspent by £5.743m, so there was a variance of £1.269m and the reasons for the over spend is shown in Table 1.</p> <p>Table 2 shows that in 2020/21 the over spend in was higher but for 2021/22 it shows a downward trend. The service is doing very well to contain the over spend.</p> <p>The DfE expects the LA to produce a plan and this is illustrated in Table 4.</p>	

	<p>In 2019/20 we ended the year on £14.558m. Last year we ended on £24.221m. If we do not do anything the predicted forecast is £33.408m by 2025-26. However, if we adhere to our plan the predicted forecast is £28.519m. We cannot pay off the debt because the block figure is not enough.</p> <p>The DfE is paying off some authorities over spend. Croydon are not in that category yet. Another LA is £60m overspent. We should not be limiting the DSG spend on children's needs as this might result in poorer outcomes. At the moment pupil numbers are dropping but this cannot be taken as an ongoing trend. EHCP numbers are also dropping, but we are not sure of the reasons why. This could change.</p> <p>JD asked to see how the forecast/analysis is done around demographics. Including more pupil per head spending would be helpful. The population has changed a lot over the last 5 years. We do not have this in the dashboard at the moment and the more financial information will help this group. He asked CQ to work with him going forward to unpick the figures and get the robust forecast in place.</p> <p>KR said when we get to JD data feedback we are not yet seeing a reduction for assessments for plans, from the work that MS is doing.</p>	
6.	<p>Beckmead School - Update</p> <p>The discussion earlier covered the Beckmead update.</p> <p>CQ wanted it noted the Beckmead have agreed to accept the figure £320k and not the original £600+k.</p> <p>RV said it is absolutely the academy's responsibility to ensure they are completing all the returns and it needs to be noted going forward.</p>	Charles Quaye
7.	<p>Future Meetings – Update</p> <p>RV said would like meetings next year to be held in BWH looking that would facilitate a hybrid meeting.</p>	Rob Veale
8.	<p>SEN Data Dashboard</p> <p>JD said the paper was not circulated before the meeting and will make sure it is circulated. Concerns to watch out for are:</p> <ul style="list-style-type: none"> • The increase in the number of EHCPs assessment requests. This has been a concern across various LA's during Covid-19 SEN data collection; • The timings of the EHCP around physiotherapy. The rate of our SEN support pupils with more than one suspension is higher than both England and our neighbours; 	Jonathan Driscoll

	<ul style="list-style-type: none"> • The delivery of the 2-2.5 year health visitor checks remains low at 40%; • Look at the pupil numbers around those with an EHCP – what is the percentage of who are in state funded schools - this decreased from 38.5% to 34.3%. That was between July and August. This may be because there are pupils on the system at the moment without a provision which has increased from 1% to 3%. He will run an update figure to find out the latest position. • There appears to be an increase in the post 16 cohort in institutions. He will check on the trend for this. • There is an increase in the unknown figures <p>RV asked JD to produce a paper about what to look out for and what the information is telling us.</p> <p>KR said that BH had been supplying details are the amount of funding that goes out into our maintained or academies around decision around the resource panel funding. Those figures should be used within the dashboard. Approximately £2m into our maintained and £4m into our academies.</p> <p>ACTION: JD to produce a paper about the SEN Data Dashboard for the next meeting</p>	
9:	<p>16-25 Pathways</p> <p>KR said the data for our post 16 placements is coming through shortly in terms of take up of placements within the college sector. We have had a successful placement round with Croydon College. More than 52 students are joining their courses this year. The transition support into adulthood is not 'kicking in' early enough. Due to the impact of Covid we have 2 students who are doing an additional year. We have placed 8 students aged 16-19 at AVA (although not officially open at the moment for KS4/5). We have negotiated with OCAT to run a course this year.</p> <p>A proper paper could be brought to the November meeting.</p>	Kathy Roberts
10.	<p>Addington Valley Academy</p> <p>AVA is now official and the staff are in place. The 80 children and young people placed there from reception to KS3. There are phased inductions. All but 8 children are placed on the formula funding and 8 have required some top up funding.</p>	Kathy Roberts
11.	<p>Tribunals</p> <p>KR has been running SEN training including types of provision available in mainstream from Early Years right through. We have the inclusion initiative running with MS and his team. With regards to tribunals it means we have some really strong challenges to offer whenever we are taken forward. Many are resolved via mediation before going to court, 8 are currently in</p>	Kathy Roberts

	<p>the pipeline. The ones that came through last year 86% came out in favour of the LA. The ones that did not tended to be in the upper age range.</p> <p>There seems to be a drive on dyslexia which is raising its head as a pressure point and needs to be worked on. There is an independent school that specialises in dyslexia and the LA has several children placed there at the moment.</p> <p>Richard Charles who is the new LA Tribunal manager within the service is at the point of completing his end of year academic review. This paper can be brought to panel with more detail on the impact of support. The issue is there are not enough judges or courts to hear them.</p> <p>RV said that perhaps we could raise the issue of lack of judges with their Right Honourable MP for Croydon South as Minister of Justice.</p>	
	<p>RV thanked everyone for joining and for providing papers for the meeting.</p>	

Meeting Finished at: 12.13pm

NEXT MEETING WEDNESDAY 19 OCTOBER 2021, 10am via Zoom