

Islington Schools Forum

Meeting documents and minutes published on [Islington Schools Forum webpage](#).

Minutes of the meeting held on Thursday 14 July 2022 at 2pm, Laycock Centre, N1 1TH

Attendees

Present

- Abi Misselbrook-Lovejoy (AM-L); Executive Head teacher, Rotherfield and Newington Green Primary Schools (Chair)
- Cassie Moss (CM); Head teacher, Yerbury Primary School (Vice-chair)
- Maggie Elliott (ME); Governor, Montem Primary School (Edventure Collaborative Federation with Drayton Park) (Vice-chair)
- Jesse White (JWh): T4 Trust - The Arts Xchange, CEO (Alternative Provision Free School)
- Jenny Lewis (JL); Head teacher, Thornhill Primary School
- Alan Streeter (AS); Head teacher, Beacon High Secondary School (Islington Futures Federation)
- Patrick Mildren (PM); Head teacher, Canonbury Primary School
- Anita Grant (AG); CEO, Islington Play Association
- Cllr Angelo Weekes (AW); Islington Council – non-Executive Member
- Fiona Maccorquodale (FM); Head teacher, Prior Weston Primary School and Children's Centre

Other attendees

- Tim Partington (TP); Head of Children's Services, Finance
- Debbie Stevenson (DS); Head of Early Years and Schools Finance Services
- Alison Cramer (AC); Assistant Director, School Support and Information Services
- Jane Wright (JW); Manager Schools and EY Governance (Clerk)

Observer

- Cllr Ernestas Jegorovas-Armstrong

Apologies

- Ana Sevilla (ASe); Executive Head, New River Green and Packington Children's Centres
- Andrew Bosi (AB); Governor, Rotherfield Primary School
- Coleen Marshall (CM), 14-19 Partnership, City and Islington College
- Claire Hersey (CHe); Principal Finance Officer, City of London Academy Trust
- Tanya Watson (TW); Head teacher, William Tyndale (Primary Academy)
- Penny Barratt (PB); CEO, The Bridge MAT
- Francis Gonzalez (FrG); Head teacher, Richard Cloudesley Special School
- Vicky Linsley (VL); Head teacher, St Mary Magdalene Academy (Secondary)
- Paul Lasok (PL); Governor, St Aloysius Secondary School (and St Joseph's)
- Susan Service (SS); Head teacher, Arts & Media School Islington
- Sarah Callaghan (SC); Director of Learning and Culture

Not in attendance

- Sally Franklin (SF); Head teacher, North Islington Nursery and Children's Centre
- Nigel Smith (NS); Head teacher, New River College (Pupil Referral Unit)
- Joe Simpson (JS); Governor, St Peter and St Paul Primary

Meeting minutes

No.	Agenda item	Action
1.	<p>Welcome/Apologies for absence/not in attendance</p> <p>AM-L welcomed all to the meeting, including the new member of the Forum, Jesse White (JWh), from The Arts Xchange. He and Matthew Hillman (from the Pears Family School) would be alternating their membership each year, representing Free schools that are alternative provision, with Jesse taking the first year.</p> <p>Initially the meeting was not quorate, but there were no decisions to be made at that stage. It appeared that some members had not realised that the meeting was in person rather than virtual, which led to higher than usual absencies.</p> <p>Apologies as above.</p>	
2.	<p>Minutes of the previous meeting (held on 19 May 2022)</p> <ul style="list-style-type: none"> • Accuracy – the minutes were agreed as an accurate record of the meeting. • Other matters arising were covered by the agenda. <p>Noted and Agreed</p>	
3.	<p>Schools forum composition – to be noted</p> <p>The clerk (JW) spoke to a brief report previously circulated.</p> <p>3.1. Non Schools Voluntary & Community representative</p> <p>Anita Grant, CEO of Islington Play Association, was due to leave her post in Islington in July and so there was to be a vacancy for this position. This also meant that a new Chair of the Early Years Subgroup would be needed. AM-L thanked AG for her many years of service on the Forum and wished her well for the future.</p> <p>Discussions were taking place with colleagues in Early Years</p>	Action

	<p>and Childcare about possible routes for filling this position.</p> <p>FM expressed interest in chairing the EY Subgroup in the future.</p> <p>3.2. Terms of office due to end in December</p> <p>The term of office of Cassie Moss, Primary Headteacher (and Vice-chair of Forum), and of Paul Lasok, Secondary Governor, were due to end on 10 and 11 December 2022 respectively. It was their first term of office.</p> <p>On being asked by the Clerk, both had indicated they were happy to do a further term of office.</p> <p>Recommendation:</p> <p>It was decided to bring this item to the next Forum meeting in autumn term 2022 meeting, given 10/11 December (dates when terms of office end) still quite far off.</p> <p>Noted</p>	<p>Clerk</p>
<p>4.</p>	<p>School Balances (FINAL 2021-22)</p> <p>DS spoke to a report that had been circulated in advance.</p> <p>The table in Appendix A provided details of school balances to be reported to Department for Education (DfE) as at 31 March 2022 compared to those held at March 2021. The final reported school balances totalled £8.3m, compared to a balance of £9.459m in 2020-21, representing a net decrease of £1.145m -12%.</p> <p>Use of projected underspend for capital purposes was reflected in the report. While the Planned Use of Surplus Balances (PUSB) did not have to be reported to the DfE, once they were taken into account, the balance reduced to £7.7m.</p> <p>Appendix A also RAG rated schools in relation to deficits. The 11 Red-rated schools - projected to be in deficit in 2022-23 – were meeting with the Local Authority (LA) termly or half-termly to discuss their Deficit Reduction Plan (DRP).</p> <p>The 12 Amber-rated schools with emerging deficits – projected to be in deficit in 2023-24 and/or 2024-25 – will be meeting with the LA</p>	

	<p>after the October 2022 Census so as to update their budgets and look at scenarios.</p> <p>In the next two weeks, the LA was due to receive the indicative factor values for financial year 2023-24 and the new operational guidance – in the light of those some schools may find they do not have a deficit.</p> <p>The 29 Green-rated schools were projecting a surplus across all three years 2022-2025. Nevertheless, they will need to keep an eye on their forecasts in autumn 2022. It was much easier to take action early to rectify projected deficits.</p> <p>DS stressed the importance of budget monitoring being on every Full Governing Board and Finance Committee agenda, and she referred to the stark reduction of £5m in balances from £8m in 2021-22 to the projected cumulative balance of £3m in 2022-23.</p> <p>In response to AM-L's question asking if other boroughs such as Camden and Hackney were in a similar position, the meeting was informed that the S251 information was not yet available. A survey of LAs (by the Society of London Treasurers) across the last two years had not yet been published. Nevertheless, it was known that other London boroughs were in a similar situation. TP mentioned the speed of reduction in balances in Islington.</p> <p>DS felt that the quality of budget setting could be stronger, given some large differences between some projected outturns and the actuals. DS would be reviewing ratified budgets compared to actual outturns for 2021-22, and 2022-23 ratified budgets.</p> <p>ME asked if budget setting was out in both directions – over and under cautious. DS replied that overall balances are more than predicted and there was some decrease in projected deficits. She recognised it was good to make savings and to have a contingency, but there was the issue of the accuracy of budget setting, with much too much prudence in some cases.</p> <p>ME felt that if a school understood its budget and was able to make savings over the contingency, the school should be applauded. DS commented that even in the last six weeks, there had been a £2.3m change between the final position and that at monitoring stage.</p> <p>AW asked if there were any surprises about which schools were rated Red, and what happened if a school could not improve its Red rating after three years. DS was not surprised about the Red schools. The school and governors would receive support and it was a</p>	
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	<p>statutory requirement to turn around the budgetary situation in three years, even though it was challenging.</p> <p>CM mentioned that Headteachers were working hard to generate revenue, and it was difficult to budget when you did not know how much income you would have. DS reiterated the importance of scrutiny of budget projections throughout the year.</p> <p>AM-L mentioned the cost of agency staff to cover unfilled vacancies – AG added that EY providers were in the same position. Childcare providers were also having to contend with reduced demand for their services as an impact of COVID.</p> <p>CM commented that the RAG rating of schools on the report was very helpful.</p> <p>Recommendation: Schools Forum were asked to note Islington’s final 2021-22 schools’ balances position</p> <p>Noted</p>	
5.	<p>DSG Outturn (Final 2021-22)</p> <p>TP spoke to a report that had been circulated in advance.</p> <p>There had been no changes to the balances reported to Forum in May 2022, after schools had submitted their final budgets by the end of May, including their planned use of surplus balances for capital and other purposes.</p> <p>AM-L asked what had happened to the report on the Speech and Language Team (SLT) that CH had said in May would be brought to Forum in late July. A report would be brought to the next Forum meeting in autumn 2022.</p> <p>Noted</p>	<p>Action:</p> <p>CH</p>
6.	<p>Schools Internal Audit Programme Outcomes (2021-22)</p> <p>Laura Westwood spoke, on behalf of Ursula Brown (UB), Audit Manager, to a report previously circulated. The report highlighted the key issues arising from audits of four schools and draft audits of five schools in the past year. There were no massively new issues arising compared to previous years.</p>	

	<p>The perennial issues included committing and authorising expenditure (purchase orders). Contractual expenditure should be committed at the beginning of the financial year so there is visibility in the budget.</p> <p>There were also ongoing HR and Payroll issues, including vetting new people and keeping the Single Central Record up to date. Also asset management and audit trails came up.</p> <p>UB was recommending training for schools. She had produced upfront guidance for School Business Managers on what audit looked for, the criteria they used, relating to the Schools Financial Value Statement (SFVS) and the LA's Scheme for Financing Schools. Audit's work programme had taken into account the impact of COVID.</p> <p>Audit was refreshing its work programme for 2022-23 – it was to look at the same topics such as SFVS but to be less burdensome for schools.</p> <p>JL commented on the usefulness of the report. She asked if Audit just reported on schools buying in to the LA's Finance SLA, and if there was any comparison of audit outcome between schools buying in and not buying in. LW replied that audit only looked at maintained schools, and that there were different levels of packages schools could buy in to. DS acknowledged a comparison of outcomes would be a good idea.</p> <p>JL asked in relation to purchase orders, how much the Finance Service was picking up poor practice. And she suggested that the headlines of what Audit looks for be shared at a Heads' Briefing – DS agreed to look at doing that. In addition, Finance and Audit had been discussing how to support improvement by schools and materials would be shared, including with School Business Managers, on IslingtonCS.</p> <p>ME asked for guidance for governors, given they had to sign off the SVFS. DS agreed, given the variable quality of SFVSs.</p> <p>FM suggested that the Strategic Finance training she had attended be a requirement of Red-rated schools.</p> <p>AG added that trustees of voluntary nurseries were under the same stresses – they needed to know what training staff should have done. She felt that Red-rated settings should be supported – not a punitive approach.</p>	<p>DS</p> <p>DS</p> <p>DS</p>
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	<p>AM-L commented that both her schools had been audited – it had been burdensome and time-consuming and welcomed it becoming a more efficient process. She suggested purchasing should be a less paper-driven process, with easier systems, and queried whether all the management stages were necessary.</p> <p>Laura W thought most purchases were being done via accounting systems and that the old paper purchase order pads were being phased out. JL was still using a paper system based on Excel spreadsheets.</p> <p>JWh commented that there were some relatively cheap IT systems on the market for this. JL added that such a system was included in Arbor which some schools were beginning to use – training on this was due in late July. DS advised that the Finance Team were to be accredited in Arbor.</p> <p>AM-L thanked Laura for her report.</p> <p>Noted</p>	
<p>7.</p>	<p>DSG Allocations (2023-24)</p> <p>DS informed the meeting that the DfE had yet to publish these allocations.</p> <p>Noted</p>	
<p>8.</p>	<p>Final DSG Budget (2022-23)</p> <p>TP spoke to a report previously circulated.</p> <p>Since the January 2022 forum meeting, there had been updated High Needs Block allocations which had been reported to the High Needs Subgroup in March. The HN funding envelope was still provisional.</p> <p>There was additional funding, bringing the total funding envelope to £4.570m. However, this balance reduced to about £2.1m with the projected increase in the number of Education, Health and Care Plans.</p> <p>The HN Subgroup in March discussed uses of the funding envelope, including:</p> <ul style="list-style-type: none"> • increased top-up rates in our special schools 	<p>Action:</p>

	<ul style="list-style-type: none"> • increased numbers of places in Samuel Rhodes Special School and in Montem and Prior Weston Primaries • reprofiling provision in special schools and New River College to ensure they were meeting the complexity of needs • increased rates for Early Years Priority Early Learning (PEL) places in 2021-22 and 2022-23. <p>This was leaving unallocated HN expenditure of £849K which was necessary to hold back due to the volatility of the HN budget.</p> <p>The Government had indicated there would be similar HN growth in the next two years but, beyond that, increases would be reduced.</p> <p>JL commented that she had requested information about the increase in demand rather than estimates previously. TP confirmed these would be provided at the next meeting.</p> <p>CM noted the uplift in the Speech and Language Therapy (SALT) EY contract and asked about SALT for Key Stages 1 and 2. TP replied that there was due to be a £100K top up in 2022-23 pending CH's paper following the report on SALT from the CCG (see Item 5 above).</p> <p>FM commented on SALT recruitment issues, with schools still having to pay even with vacancies. AM-L reminded Forum they only had a consultative role in relation to HN funding decisions. It was added that in Camden the therapists were appointed on a term-time-only basis and they had resolved their recruitment difficulties – perhaps Islington LA/schools could commission a TTO service.</p> <p>Noted</p>	<p>TP/CH</p>
<p>9.</p>	<p>DSG Schools Block estimated funding (2023-24)</p> <p>DS spoke to a report previously circulated – she was only able to speak about the Schools Block (SB), including the Central Schools Services Block (CSSB) at this stage.</p> <p>Based on pupil number comparisons only, the SB was estimated to reduce by £1m overall between 2022-23 and 2023-24. This would include the ongoing reduction by 20% (£84K) each year of the Historic Commitments item under the CSSB.</p> <p>The DfE was due to release further information about 2023-24 reflecting increases from the public spending review.</p> <p>NOTED</p>	<p>Action:</p>

10. National Funding Formula Funding Consultation

DS spoke to a report that had been previously circulated.

The DfE had held a consultation about the NFF in 2021 with a focus on pupil-led factors. From March 2022, all LAs were to be 10% closer to the forthcoming hard NFF. As previously reported to Forum, Islington was already working in line with the hard NFF, although there was one anomaly in 2022-23 which was passported through the base rate factor.

The DfE launched a second NFF consultation on 7 June 2022. They indicated they expected to move to direct NFF by 2027-28 at the latest.

The consultation referred to the interaction between the direct NFF and funding for high needs – consultation on this to come following the outcome of the Green Paper on SEND and Alternative Provision, but they were looking to develop a national framework for SEND provision.

In relation to Growth, one option still proposed local flexibility (a role for LAs) but with some restrictions, the other a nationally standardised system with no role for the LA.

In relation to Falling Rolls, they were looking to standardise the allowable criteria and were considering no longer limiting to schools that were Good/Outstanding, but would still need to show the need for places in those schools in 3 years' time.

Premises funding – there was to be a later consultation in relation to funding of PFI schools due to the complexity of their contracts – new arrangements would be implemented at the same time as the direct NFF in 2027-28. This affected mainly secondary schools in Islington.

There was to be a national formula for split-site schools, coming into effect in 2024-25. This would affect two schools in Islington.

In response to two questions about the possible negative impact, including budget deficits, of Islington implementing the NFF already, DS said there were no negative impacts as it had been implemented with a phased approach to avoid cliff edges. There were protection arrangements and the Minimum Funding Guarantee (MFG) could not be removed. In relation to deficits, DS reiterated that schools were facing lots of pressures such as EHCPs and energy bills. TP added

	<p>that the LA had done certain things at certain times in introducing the NFF factors to get the best deals for schools and to protect them.</p> <p>DS advised the meeting of further DfE consultations on the NFF, including in relation to HN. The EY (EYNFF) funding consultation, launched on 4 July, was looking to use more up-to-date underlying data in relation to the rates for free early education for two-, three- and four-year-olds – the DfE had been using data relating to 2017/18 or older to determine funding of the rates. This was welcome news. The Teachers’ Pay and Pensions Grants were to be included in the EYNFF.</p> <p>Also, there was good news that £10m extra funding had been identified through the spending review for maintained nursery schools, with an indicative allocation of £60K for Islington.</p> <p>The DfE launched a separate consultation on 4 July on reducing staff to children ratios in registered EY childcare.</p> <p>The deadline for responses to both consultations is 16 Sept 2022.</p> <p>AG asked if responses should come from providers and/or the Forum. ME felt it would be good to have a response from Forum and TP also felt it would be good to have responses from PVI’s. DS said that the LA would work on its response and share prior to the deadline date.</p>	<p>DS/TP</p>
<p>11.</p>	<p>Forward Planning – for information</p> <p>DS spoke to a report that had been previously circulated – new items were in red.</p> <p>DS would clarify whether there was to be an October Forum meeting (as well as November) depending on what comes from the Government over the coming weeks and when decisions were necessary. ME felt it was good to have an initial discussion in October and then further discussion in November.</p> <p>AC advised Forum that the Schools Organisation Programme Board would be taking its overall plan to Executive in October – the outcome of that would go to Forum in November.</p> <p>The review of services was to be covered under AOB.</p>	<p>DS</p>
<p>12.</p>	<p>Sub Group Updates:</p>	

	<p>Capital – ME reported that letters had gone out to schools inviting applications for match-funding – the letters clarified what was and wasn't capital funding. There was £200K available, with Health and Safety a priority and schools required to contribute 25% of the costs.</p> <p>More requests had come in than the funding could cover. Three bids were under the minimum of £10K so were disqualified. Some schools had lumped together 3 or 4 smaller requests – these were only agreed if at least one item required capital funding of at least £10K.</p> <p>In the end, £175K had been allocated. It was agreed to publicise that £25K was available for H and S emergencies in Schools Bulletin and Chairs of Governors Update. JL asked for there to be clarity around the application process – ME said that they would start the process earlier next year and be clearer about the application process and criteria. A letter would go out in advance of the allocation, acknowledging the possibility of there being no funding but to help schools prepare.</p> <p>Early Years</p> <p>AG reported. Significant concern over numbers of 2s, 3s and 4s. AG asked about the latest Childcare Sufficiency Assessment.</p> <p>High Needs</p> <p>No report since last Forum.</p>	ME
13.	<p>AOB: Survey of Services update</p> <p>AC encouraged settings and their colleagues to complete the short online survey asking for feedback on Traded and other LA services to schools. This was the first step in our Quality Assurance process around assuring value for money and quality of services. The second step would be in the autumn term with the panel to review feedback from the survey and other information – a report would then go to Forum in January 2023 for decisions relating to Central Schools Services Block (CSSB) 2023-24. This would be an annual process (subject to review).</p>	
	<p>Meeting close and dates of future meetings</p>	

	AM-L thanked all for their participation in the meeting. The meeting closed at 3.47pm	
	<p>Dates of next meetings</p> <p>(virtual meetings on MS Teams unless otherwise indicated)</p> <p>Autumn term 2022</p> <p>Capital Sub Group - Thursday 13 October, 12.30pm – 2pm</p> <p>High Needs Sub Group - Monday 17 October, 11am - 12.30pm</p> <p>DSG/Chairs Sub Group – Wednesday 2 November, 2pm – 3.30pm</p> <p>Schools Forum – Thursday 10 November 2-4pm, in person – Committee Room 4, Islington Town Hall</p> <p>Early Years Sub Group - Friday 18 November, 1pm – 2.30pm</p> <p>Spring Term 2023</p> <p>DSG/Chairs Sub Group – Wednesday 11 January, 2pm – 3.30pm</p> <p>Capital Sub Group - Thursday 12 January, 12.30pm – 2pm</p> <p>Early Years Sub Group - Friday 13 January, 1pm – 2.30pm</p> <p>High Needs Sub Group - Monday 16 January, 11am – 12.30pm</p> <p>Schools Forum - Thursday 19 January, 2-4pm, in person – Committee Room 4, Islington Town Hall</p> <p>Summer Term 2023</p> <p>Capital Sub Group - Thursday 11 May, 12.30pm – 2pm</p> <p>DSG/Chairs Sub Group - Wednesday 17 May, 2 – 3.30pm</p> <p>Early Years Sub Group - Friday 19 May, 1pm – 2.30pm</p> <p>High Needs Sub Group - Monday 22 May, 11am – 12.30pm</p> <p>Schools Forum - Thursday 25 May 2-4pm, in person – venue tbc</p>	

	DSG/Chairs Sub Group - Wednesday 5 July, 2 – 3.30pm Schools Forum – Thursday 13 July, 2-4pm, in person – venue tbc	
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