

# Minutes - Sheffield Education Funding Forum

3.00-5.00pm, 24 June 2025, online via Teams

Chair: Keith Crawshaw

## Schools Forum Members:

### **Primary Heads Representatives**

- Nigel Brooke-Smith (Greystones)
- Helen Kenyon (Pipworth)
- Chris Holder (Lowfield)

### **Primary Governors**

- Alison Warner (multiple schools)

### **Secondary Head**

- Linda Gooden (King Edward VII)

### **Non-school Members**

- Stephen Betts, Learn Sheffield
- Andy Krabbendam, Faith Sector (Clifford All Saints)
- Fiona Hawksley/Lisa Smith, Trade Unions
- Karen Simpkin, Early Years providers (Sunflower Children's Centre)
- Sarah Le-Good/James Smythe, 16-19 Sector (Sheffield College)

### **Academies**

- Ann Allen (Chorus Education Trust)
- Keith Crawshaw (Sheffield South East Trust)
- Jim Dugmore (Peak Edge Academy Trust)
- Neil Miley (Mercia Learning Trust)
- Morag Somerville (Steel City Schools Partnership)
- Nevine Towers (Diocese of Sheffield Academy Trust)

### **Special Academies**

- Joel Hardwick (Nexus Multi-academy Trust)

### **Special Schools**

- Laura Rzepinski (Bents Green)

### **PRU**

- Rhona Dodds (Sheffield Inclusion Centre)

**Apologies:** Stephen Betts, Rhona Dodds, Sarah Le-Good/James Smythe, Laura Rzepinski, Karen Simpkin, Alison Warner

**Also in attendance:** Cllr Dale, Chair of the Education, Children and Families Policy Committee; Cheryl Eyre, Interim Director for Belonging; Amanda Murray, EY, Education and Skills (notes); Mark Sheikh, Head of Service, Resourcing and Business Planning

**Presenters:** Jacky Beatson, Resourcing Manager; Ben Compai, Procurement and Supply Chain Manager; Andrew Kemp, Senior Procurement and Supply Chain Manager; John Mansergh, Service Manager, Inclusion and Attendance; Glen Swaby, Head of Procurement and Supply Chain

**Observers:** Lucy Lee, Performance and Analysis Service

## **1. Welcome, apologies and declarations of interest**

- Forum Members noted the sad news that Alan Richards, Chair of the Pupil Referral Unit Management Committee and Forum member, has recently passed away. On behalf of the Forum, the Chair expressed sympathy to Alan's family.
- Apologies were noted as per above.
- No declarations of interest were made.

- The Chair welcomed Cherly Eyre, Interim Director for Belonging, to the Forum. Cheryl will be in post until the end of November 2025 and the Council is looking to appoint to the position permanently by 16 July. Cheryl is looking forward to meeting and working with members of the Forum.

## **2. Previous meeting minutes/matters arising**

The minutes were agreed as a true and accurate record. The following matters arising were raised:

### Early Years Letter to Secretary of State

Further to the latest letter sent to the Secretary of State. We have not received a satisfactory response which addresses our specific concerns.

### Early Years Case Studies

At the February Forum meeting, members were invited to provide case studies to Cllr Dale in relation to the revised statutory DfE guidance that had just been released. To date, no case studies have been received to enable Cllr Dale to progress our concerns.

### Pupil Premium Rates

Jacky will make reference to these later in the meeting and will circulate the rates with the minutes.

### Disability Access Funding (DAF)

Further to Paper 5 from the February meeting, the Forum is asked to note the following correction: DAF has increased by £28 (not £22) per pupil to £938.

### Free School Meal (FSM) Transitional Protection

The plans to end transitional protection for FSM have now been extended until the end of 2025/26 academic year. From September 2026 families must meet the eligibility criteria to be entitled to FSM.

## **3. Exclusions Update**

John Mansergh gave an update, as per Paper 3, and highlighted the following key points:

- This update is for information and discussion only.
- We have recently taken a report to Committee – on 10 June.
- There are high levels of exclusions and associated challenges regarding sixth day provision.
- Our permanent exclusions are very high – higher than national levels, core cities and statistical neighbours – and are rising.
- Children are waiting longer than they should be to be placed.

- There is a lack of a coherent strategy; lack of alternative provision and sixth day provision; variable levels of challenge and accountability; and a disproportionate number of vulnerable children being excluded.
- We are focussed on working towards an effective solution and to take preventative measures.
- We have established a Challenge Board which Cllr Dale is leading, to provide an additional level of scrutiny and to ensure increased accountability, and also to undertake an analysis of needs.
- We are looking to build on good practice, for example the Compass network which has low exclusion rates.

Forum discussion can be summarised as follows:

- The Chair noted that we are now acknowledging that the bulk of exclusions come from a small number of schools/trusts.
- To consider how we achieve a coherent approach to decisions/reasons for exclusions, and what the role of trustees/governors is in these decisions – how do we challenge them?
- It was acknowledged that some schools have different issues, for example due to catchment areas and that we need to support them.
- To be mindful that SEND may not always be the reason for an exclusion as often as it seems – rather that it may be diagnosed as a result of exclusion.
- Cllr Dale suggested being careful with the use of language: that permanent exclusion can imply exclusion from education generally rather than from one setting and that it's important that there are alternative opportunities for the child. She suggested that we need to follow Department for Education (DfE) guidance and not use the term permanent exclusion.
- However, Forum members confirmed that the DfE guidance does include the term permanent exclusion and that we should apply the guidance in a fair and constructive way.
- There is disparity across the sector. We should look at the child holistically and decisions need to be on setting-by-setting basis. King Edward VII school has been targeting exclusions and is part of the Compass Network which provides a robust model/approach. They have seen significant improvements as result of working in partnership. It was agreed that we therefore need a city-wide strategy to address the issues.
- The Challenge Board has met once to date – it is an organic process in the early stages and is based on partnership and relationships. The Board welcomes feedback about how we should have the conversation.
- We need to consider the transition from primary to secondary – how we prepare children to cope with change of environment. Also, a change of head teacher can make a difference to exclusion rates.
- Cllr Dale previously undertook research around transitions and how we support families – parents as well as the children. There is anxiety amongst families at transition, and parents do not have the same relationship with secondary schools as they did with primary schools.

John Mansergh thanked the Forum for their input and concluded that:

- We need to strengthen the conversation and would welcome discussion around the reasons for exclusions across the city as rates do vary widely. We need specific conversations with certain areas.

- We also need discussions about how we use resources effectively – we would prefer to spend on prevention rather than sixth day need.
- We will bring future updates to the Forum.

**The Forum noted** the paper and Committee Report, the actions underway, and that further updates will be brought to the Forum.

#### 4. PFI Expiry Update

Further to the action from the February Forum, Glen Swaby, Ben Compai and Andrew Kemp from Commercial Services, updated the Forum on progress as per Paper 4:

- The paper provides an update on work to date: to ensure that Phase 1 is successfully delivered on time.
- There are a series of workstreams as noted in section 2.3.
- The new project team came into force in March/April 2025 and is developing core project management principles.
- Six schools' contracts are due to expire in August 2026 (see section 1.1).
- We have set out key objectives of what is required of schools in terms of the handover, for example around building condition.
- We have met with all six schools to share plans and the communications strategy.
- The Project Board meets monthly to track the plan.

Forum discussion raised the following points:

- The question was raised about the timeline for future phases and about what lessons had been learnt. There needs to be adequate time to ensure that the buildings are maintained to specification. It was confirmed that we are still capturing lessons from the first phase and that the main lesson is to ensure we start work early enough on future phases – we will be starting to look at contractual obligations shortly.
- There were concerns from start of Phase 1 regarding what work needs to be undertaken – has the work schedule and price now been agreed? Commercial Services agreed that they share these concerns and are working on this and the current thinking is that it can be delivered, based on the Special Purpose Vehicle's condition survey.
- By the end of summer Sheffield City Council (SCC) will know the status of works to be completed and if there are any disputes with contractors.
- King Edward VII Lower School is one of the Phase 1 schools:
  - They are now cautiously optimistic and reassured, compared to concerns they had a few months ago regarding the lack of capacity in the core team.
  - The monthly meetings have been positive and constructive and give schools the opportunity to raise questions.
  - The plan has been received but they are concerned about some of the timescales e.g. re. the TUPE process which does not allow adequate time.
- There are still some concerns that work might not be completed by the end August. Regarding the money allocated to complete key work – if a school reaches the end of the contract and the work is not completed; how will the money be managed post-expiry and how will SCC work with schools to ensure work is delivered/quality assured beyond end contract? Glen confirmed that we

will work to establish a post-expiry agreement, but it is preferable to deliver on time.

**The Forum noted the update**, and the Chair requested that a further update be brought back to the December meeting of the Forum.

## **5. SEND Top-up and Locality Funding Update**

Mark Sheikh presented this standing item – an update for information only - and summarised the following key points from Paper 5:

- We procured a resource allocation system banded funding system called Formulate for SEND from Imosphere. Phased implementation commenced in September 2024, and the system will go live to allocate funding for all pupils with Education, Health and Care (EHC) plans in mainstream schools from September 2025.
- As per section 2.7 - we have an internal moderation process to ensure accuracy and consistency in implementation.
- We have increased investment by £5m - from £8m to £13m.
- We have provided additional funding – a school level high needs support fund of £2.5m for children with additional needs but without an EHC Plan.
- Not all schools capture needs via the Sheffield Support Grid (SSG) so we have created a model that uses the SSG, Income Deprivation Affecting Children Index (IDACI) or a hybrid model for distributing this funding, with a minimum funding guarantee of £10,000 for standalone infant schools and nursery infant schools due to unique pressures – see section 3.5.
- We continue to review the arrangements going forward and would ideally need to invest more to strengthen mainstream provision and avoid escalation.

Forum questions clarified the following points:

- Regarding the review of SEND and quality issues, SCC is working on the transformation programme and this work is gathering pace and is a key priority. We need to review EHCP processes. There was previously some consultation work that has been delayed and there is now funding set aside to complete this. We have a plan in place and funding to implement it. We have also been meeting with Learn Sheffield regarding the SEND Manifesto.
- SENCOs are reporting that some allocations are incorrect and that there is a shortfall in funding for 2025/26 – is the funding going to be allocated or will the shortfall increase? Mark confirmed that we have an anticipated overspend of £15m on the High Needs Block and any commitments will increase this deficit. We will update the Forum in September about this and the statutory override, which has now been extended by two years, meaning that overspend doesn't need to be shown on our balance sheet. We are hoping/expecting that the funding allocation will increase. This will be ongoing agenda item for the Forum.

**The Forum noted** the update.

## **6. Growth Policy and Falling Rolls Update**

Jacky Beatson summarised Paper 6:

- The Growth Fund is reducing as a result of primary numbers falling.
- Basic need growth has now reduced to £1.055m for next year. We will be distributing this to schools in August for September starts.
- There is no funding for Falling Rolls, so we are therefore rolling forward £200k funding from last year.
- In response to Jim Dugmore's previous question about academy reserves balances, and pooling versus individual academy reserves. Jacky has now revised the wording in both policy documents. If a trust pools reserves, they will need to provide details of an apportioned reserve for the school in question.

Further discussion clarified the following:

- Reserves are published in December for the previous year. However, when preparing budgets, a school/academy makes forecasts for reserves so should be able to use that figure rather than a historic figure.
- We do not have Falling Rolls Funding this year as this is based on Census figures and numbers have not fallen overall. However, we apply our local policy and recognise that some schools do have falling rolls, but they still have to meet the strict criteria for this funding. We have published examples in the policy.

**Action:** Jacky to change the policy wording to read 'individual revenue reserves' so as not to be confused with capital, and also to be clear that schools should prioritise using their surpluses.

The Forum:

- **Noted** that the Growth Funding allocation to Sheffield has decreased to £1.21m.
- **Noted** that the Growth Funding available to schools is £1m.
- **Approved** the updated Growth Funding Policy for 2025/26 at Appendices 1 and 2.
- **Agreed** the planned Growth Funding payments of £1.05m to be paid to Sheffield schools as detailed in (Appendix 3).
- **Noted** the Falling Rolls Funding balance of 200k.
- **Approved** the updated Falling Rolls Policy for 2025/26 at Appendices 4 and 5.

## 7. Forum Membership and Constitution

Mark Sheikh summarised Paper 7:

- The Constitution is revised annually in line with the Operational Guidance.
- As requested at the February Forum, we have provided clarification around substitutes. Members are encouraged to nominate a substitute in advance to attend meetings on their behalf when they are unable to attend. The substitute should represent the same sector but does not need to be from the same school/academy.
- We have reviewed pupil numbers and proportionate representation on the Forum and whilst we need to reduce primary representation by one member, we have decided that to ensure continuity, both Alison Warner and Nigel Brooke-Smith – whose terms have recently expired - are to remain on the Forum until Autumn.
- We still have a vacancy for another Vice-chair, preferably from the secondary sector, and members are asked to put themselves forward for this role.

Forum members:

- **Noted** the updates to membership as summarised above.
- **Noted** the updated constitution document as per Appendix 1.
- **Noted and approved** the proposed revisions at section 4 of the Constitution document.

## 8. AOB

With regard to the additional funding allocation (Paper 10), clarification was sought as to implications for the early years sector:

- There are two grants - 1) National Insurance for school settings, and 2 ) the Early Years Expansion Grant for Private, Voluntary and Independent (PVI) settings. The Early Years Working Group approved the distribution of this grant to providers. However, providers are not happy with the amount of grant funding that they will receive as it will not rectify the shortfall.
- Mark reiterated the need for early years case studies, as per Matters Arising, in order to help us to construct a case when writing to the Secretary of State.

**Action:** Jacky to send the updated Pupil Premium rates for distribution with the minutes.

**Date of next meeting:** 17 September 2025, 3.00-5.00pm, Learn Sheffield