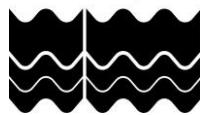


East Sussex County Council Schools Forum

Friday 17 May 2019

08.30am

**East Sussex
County Council**



Wellshurst Golf and Country Club

Agenda

Item	Heading	Paper	Lead	Item for
1.	Welcome and Apologies	N	Chair	Note
2.	Minutes of previous meeting 18 th January 2019	Y	Chair	Approval
3.	Matters Arising and Declaration of Interests	N	Chair	Discussion
4.	Formula Funding Update	Y	Ed Beale	Discussion
5.	Review of Schools Forum Membership	Y	Sarah Rice	Information
6.	Running Rural Schools Efficiently: Department for Education Report	Y	Sarah Rice	Information/ Discussion
7.	AOB	N		

Next Meeting: Friday 12 July 2019, 8.30am, Wellshurst Golf and Country Club

Draft Items for next meeting

- Funding Formula Working Group Update
- Scheme for Financing Schools Update

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EAST SUSSEX SCHOOLS FORUM

MINUTES of a meeting of the Schools Forum held at Wellshurst Golf and Country Club on 18 January 2019

PRESENT

Richard Thomas (Pevensey & Westham Primary)
Richard Blakeley (Parkside Primary)
Lizzie Field (Park Mead Primary)
Monica Whitehead (Claverham Community College)
James Freeston (King Offa Primary Academy)
Phil Matthews (Hailsham Community College Academy Trust)
Joanna Sanchez (Diocese of Arundel and Brighton)
Debbie Gilbert (Burwash CEP School)
Richard Preece (Saxon Mount and Torfield)
Mandy Watson (Diocese of Chichester)
Hugh Hennebry - Chair (Uckfield College)
Helen Key (Chailey School)
Frank Stanford (Sabden Multi Academy Trust)
Andrew Ferguson (Rye Academy)
Kate Owbridge (Ashdown Primary)
Vicky Richards (St Mark's CEP School)
Sarah Pringle (Seahaven Academy)
Phil Clarke (Trade Union Representative)
Stuart Gallimore (Director Children's Services)
Cllr Bob Standley (Lead Member for Education and Inclusion,
Special Educational Needs and Disability)
Fiona Wright (Assistant Director Education & ISEND)
Edward Beale (Schools Funding Manager)
Mark Whiffin (Head of Finance)
Sarah Rice (Finance Manager – Schools)
Nathan Caine (Head of ISEND)
Emily Taylor (Strategy and Engagement)
Amanda Altenhoven (Clerk)

1

WELCOME AND APOLOGIES

1.1 Hugh welcomed all and thanked everyone for their attendance. He confirmed the meeting was quorate, recognising there had been a number of apologies.

1.2 Apologies received from:

- Jane Johnson (Newick CE Primary)
- Emily Beer (Willingdon Community)
- Anna Robinson (Beacon Academy)
- Victoria Stevens (Eastbourne Academy)
- Geoffry Lucas (Etchingham CE Primary School)

2 MINUTES OF PREVIOUS MEETINGS – 23 November

2.1 The Minutes for 23rd November were signed off by the Chair as a true record.

3 MATTERS ARISING AND DECLARATION OF INTERESTS

3.1 There were no declarations of interest.

3.2 There was one matter arising with regards to the EALS consultation. Fiona commented that the consultation is still ongoing and comments are still welcome. It was noted that Secondary Heads have this matter on their agenda for their meeting next Tuesday.

4 Place Commissioning Process

4.1 Emily Taylor led on this paper. The purpose of this paper was to give an update on the school places commissioning process.

4.2 Emily outlined the graduated changes taking place around the process of commissioning specialist provision places in special schools and special facilities to maximise occupancy and efficiency of the use of High Needs Block (HNB) funding. The papers discussed were with reference to the last 3 years. Despite demand there were still places sitting empty 3 years ago at a cost to the HNB of £300K and there has been a discussion around the projected places. Emily discussed the forecasting model that looks at this demand and projected numbers in school. Emily then went on to explain how this process has been further developed to establish a set of commissioning principles. The new principles were discussed, which set out that funding would be recouped if places were under capacity by 5% or more for a period of 3 months. It was agreed with special heads that there would be flexibility in how this repayment was made, in order to protect the integrity of the single value top up system¹, that reflected that schools with similar cohorts should be funded equitably in a system based on the cost of provision.

4.3 Last year in the autumn term there was a discussion with heads around how to best use the places available and where there might be empty spaces looking at how to best fill these places.

4.4 Emily discussed looking forward to the year 2020 and the places in new free schools that are opening, that will need to be filled by children with the highest level need. Emily discussed the HNB review, looking across a range of provision through mainstream and special schools which recognises that there is a discrepancy in this continuum between need and provision. Para 2.6 sets out the development of a matrix for special schools to work alongside the existing matrix for mainstream schools to ensure that our highest cost placements are used by those children with the highest needs. Again there have been discussions with head teachers, looking at the continued need for children within

¹ The top up is the same value for all children attending the school.

the provision. It was commented that the Special Head teachers met with Nathan, Fiona and Emily and it was noted that this was a very useful conversation.

4.5 It was confirmed that the model outlined in the paper is the new way of moving forward and setting out the type of need for each young person. There was a comment with regard to the ISEND figures which indicated an increase in special education places. Nathan advised that forecasting shows significant growth and an external company ISOS had evaluated East Sussex's position regarding EHC plans and provision. There are now more children with EHCPs in special schools than in mainstream schools. Where a child is placed within a special school it costs the HNB more, removes a child from their community and does not necessarily provide better outcomes.

4.6 There were a number of comments regarding young people not attending (ie absent from) a special school. Nathan advised that this is not a huge number but there is a need to ensure we are maximising the use of this provision, bearing in mind the cost of a special school place. A further question was asked, if there have been any thoughts for places taken up by children with long term absence: would special schools be able to fill their place with another child. Nathan advised that it is the aim for such places to then be accessed by a child waiting for a special school place.

4.7 There was discussion regarding the link between the number of children with EHCPs placed in special schools compared to mainstream schools. There are 200 less children with EHCPs in ES mainstream schools than was the case three years ago. School representatives stated that mainstream schools are finding it more difficult to get children an EHCP and are catering as best they can. It was asked if there is a difference, now, in terms of how many EHCPs are being granted at panel compared to the old Statements of SEN. Emily responded that this is partly due to the historically high number of EHCPs in East Sussex and that the mainstream Matrix and rigorous panel process had stopped the increase in numbers. An EHCP could potentially be to the detriment of the child, rather than an opportunity. It was asked how reduced timetables work, as one school noted that a graduated increase of a timetable was written into an EHCP over a course of a calendar year. Nathan asked for details of the specific case mentioned so that the LA can look into this. He stated that we are seeing an increasing number of parents asking for a reduced timetable or elect for their child to be home educated whilst maintaining an EHCP.

5 DSG 2019/20 Budget

5.1 Ed Beale presented this paper which related to the 2019/20 DSG Budget. The Schools Block, Central School Services Block and High Needs block budgets were detailed for information only and discussions and required approvals had taken place at previous forums. Ed explained that The Early Years block budget required approval today.

5.2 Schools Block appendix B - Ed talked through the paper and explained that the Growth fund and Falling rolls fund were approved at Forum in November 2018 and the remaining funds are allocated to schools / academies via their budget shares.

5.3 Ed highlighted that the allocation from the DfE was £6.7m more than 18/19 and there were two reasons for this: £1.8m due to an increase in Numbers On Roll (NOR) and £4.9m in additional funding from the DfE.

5.4 CSSB budget Appendix C – This was approved at the November 2018 forum, but again presented here for completeness. Ed talked through the figures and explained that the final allocation was £61.3k more than the indicative allocation due to an increase in NOR. £23.1k relates to CLA licenses which are recouped by the DfE and the remaining £38.2K has been added to the transfer to the Schools Block.

5.5 Ed confirmed that the total amount that has been transferred from the CSSB to the Schools Block, and therefore into school budgets, is £4.03m.

5.6 The Chair of the Forum, Hugh Hennebry commented that the schools were very appreciative of the transfer and thanked the Council for this action.

5.7 High Needs Appendix D - Approval of budget is not required. Ed explained that the place funding for special schools and facilities remains unchanged for 2019/20. Ed explained that the allocation for Special Academy place funding has increased and Special School place funding has decreased due to a school becoming an academy.

5.8 Early Years budget Appendix E - This required approval from forum. Ed talked through the figures and explained how the different hours awarded worked for early years and how the funds distributed worked with the hours.

5.9 Ed explained that there was a substantial reduction in the allocation from the DfE for 19/20 due to the way the DfE calculated the funding for the additional 15 hours.

5.10 Approval of Early Years budget: Carried For – 14 Against – 0 Abstentions - 1

6 Review of Schools Forum Constitution

6.1 Sarah Rice introduced this paper. Sarah highlighted that in September 2018 the ESFA had issued an updated operational guidance for Schools Forum. This guidance was highlighted at the September Forum meeting and linked into the website. The ESCC Schools Forum constitution has now been reviewed in light of the updated guidance and there is no change required as a result of the review. The paper included a copy of the constitution, together with a summary table published by the DfE outlining key roles and responsibilities of the Schools Forum as a useful reminder for representatives. Sarah also highlighted that in reviewing the constitution a review of membership was also carried out. The aim is that membership is proportionate to the number of pupils attending settings in East Sussex with all schools types and phases represented. Sarah highlighted that, similar to the position reported in January 2018, the recent review highlighted that there is one more Secondary member than required and there could be one more Primary academy representative.

6.2 It was asked how long the term is to be a member, Sarah advised 4 years. Academy trusts are asked to nominate and vote in their reps, and in general the relevant phase and/ or group of schools would be consulted when a change in representation or vacancy were required to be filled.

6.3 There was a comment regarding the EALS vote back in the September 2018 meeting and how the separate phase voting impacted the vote - it was suggested it could have potentially turned out differently had the phases voted together. An action was noted for Schools Forum representatives and Local Authority officers to investigate the procedures by which votes are taken by phase of school to ensure the impact across phases is understood. Sarah Rice to meet with Richard Thomas, Helen Key and Sarah Pringle and report back to the March Forum.

6.4 It was proposed that in the interests of stability current membership would continue and, when an appropriate vacancy arose, the opportunity would be explored to redistribute the membership in line with the review. Forum were asked to agree the current constitution. Vote for the Review of Schools Forum Constitution: Carried For – 18 Against – 0 Abstentions - 0

7 Forum Meeting Dates

7.1 The future year meeting dates were presented in the papers. Ed highlighted them and confirmed that a timetable of the year ahead, which will set out future planned agenda items against each meeting, would be issued to all members before the next meeting.

Agenda Item 8: AOB

8.1 Currently a consultation is under way regarding the funding of increases to teachers' pensions employer contributions. This is just for the year 2019-20.

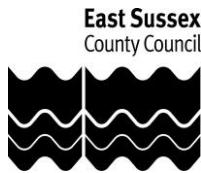
8.2 Link to the GOV consultation: <https://www.gov.uk/government/consultations/funding-increases-to-teachers-pensions-employer-contributions> (please press Ctrl and click on link to access). Forum members were encouraged to respond to the consultation.

Meeting concluded at 9.18 am
Next meeting - Friday, 22nd March 2019, at 0830 hours at Wellshurst Golf Club

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Agenda Item 4

Report to: Schools Forum



Date: 17th May 2019

Title of Report: Funding Formula Working Group (FFWG) Update

By: Ed Beale, School Funding Manager

Purpose of Report: To provide an update on the Funding Formula Working Group

Recommendation: Schools Forum are asked to note the information in relation to the 2020/21 ESCC Funding Formula.

Working Group Members

School Forum Representatives: James Freeston, Jane Johnson, Hugh Hennebry, Phil Matthews, Monica Whitehead

LA Officers: Sarah Rice, Ed Beale, Kirsten Coe

1 Background

- 1.1 Apart from the 2017/18 formula, which was unchanged due to the National Funding Formula (NFF) consultation process, East Sussex has worked each year with schools and Schools Forum to agree a local formula that has apportioned the funding as appropriately and effectively as possible for the schools and academies in East Sussex.
- 1.2 Local Authorities will be determining the Funding Formula locally for 2020/21. Therefore, the Funding Formula Working Group (FFWG) will be reconvening to review accordingly.
- 1.3 The FFWG is comprised of School representatives (Primary and Secondary Phase) and Local Authority officers, as indicated above.
- 1.4 For the 2019/20 funding formula, a thorough review of all the funding factors took place. After consultation, the outcome of this was that a number of changes were implemented:
 - The lump sum – The Primary phase saw a small stepped change of £2,000 which reduced the lump sum to £120,000 (This is still £10,000 higher than under the NFF). The Secondary Lump sum was reduced by £7,000 to £110,000 and is now aligned to the rate under the NFF.
 - Deprivation - This saw the introduction of IDACI and FSMEver6 and the realignment of the existing FSM rate which has resulted in the rates for all of these deprivation factors being aligned to the NFF rate.
 - Sparsity – The formula for calculating the Sparsity funding for schools was changed and now reflects how the calculation is determined under the NFF.
 - Minimum amount per Pupil – This was a new factor that was introduced for 2019/20 and ensures that all schools / academies receive a minimum amount of funding per pupil. Currently this is £3,435 for the Primary Phase and £4,711 for the Secondary Phase.

2 Forward Plan

- 2.1 The first FFWG meeting will be taking place on Friday 17th May at which the aims and objectives of the group will be discussed and the principles confirmed. Further meetings will be taking place over the next two months.
- 2.2 By implementing the funding changes mentioned above in paragraph 1.4, the vast majority of funding factors are now aligned to what they would be under a NFF. However, there are some that, as yet, are not quite aligned to what they would be under the NFF.
- 2.3 Therefore, potential funding factors to review for the 2020/21 Funding Formula are the lump sum for the primary phase and the minimum amount per pupil.
- 2.4 Proposals for the 2020/21 Funding Formula will be brought to the July Schools Forum with the final proposal being brought to the September Schools Forum.
- 2.5 As and when FFWG meetings occur, information about the meetings will be communicated, like previous years, to ensure schools / academies are kept informed. This will be via the Virtual School Bag (VSB) and emails. The minutes from FFWG meetings will be circulated to School Forum members and would actively encourage colleagues to read these.
- 2.6 For 2021/22, the expectation is that the NFF will be fully implemented. However, as yet, we have not received confirmation of this, and await this and further details. We will keep Schools Forum, and the wider school community informed as and when we receive information.
- 2.7 Details of the planned timeline for reviewing the Funding Formula is shown on Appendix A.

Appendix A

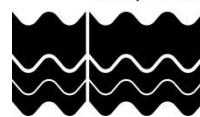
Timeline for reviewing ESCC Funding Formula :

17 May 2019	Initial update to Schools Forum
	First FFWG Meeting
June 2019	Follow Up FFWG Meetings (Dates TBC)
12 July 2019	Update of FFWG brought to Schools Forum
TBA	Potential FFWG Meeting
27 September 2019	Final proposal brought to Schools Forum
7 October 2019	Start of Funding Formula Consultation
8 November 2019	Deadline for Funding Formula Consultation
22 November 2019	Outcome of consultation brought to Schools Forum
2 December 2019	Outcome of consultation presented to Lead Member for Education and Inclusion, Special Educational Needs and Disability

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Agenda Item 5

**East Sussex
County Council**



Report to: Schools Forum

Date: 17 May 2019

Title of report: Schools Forum Membership

By: Sarah Rice, Finance Manager

Purpose of report: To update Schools Forum on the review of membership of the East Sussex Schools Forum.

Decision or Information: Information

- 1.1 The membership of the Schools Forum is reviewed regularly to ensure that there is proportionate representation of each phase in maintained and academy schools in line with the number of pupils in each category.
- 1.2 The latest review (as reported at the January Schools Forum meeting) using the October 2018 census data and the membership was found to be broadly in line with the current membership profile, but the calculation did show marginal shifts in both Primary and Secondary phases.
- 1.3 As the shift was limited to one rep in each phase, and in the interests of maintaining stability it was agreed that no changes were implemented at that point and membership would be reviewed when a vacancy arose.
- 1.4 An opportunity has arisen to reduce the number of maintained secondary school representatives and therefore the membership structure has been amended to reflect this in line with the aim of proportionate representation.
- 1.5 Hugh Hennerby's membership is due to expire in June 2019. This coincides with Emily Beer requiring to step down temporarily from the Forum. The Maintained Secondary Heads have been consulted and have decided to allow Hugh to renew his membership. The number of maintained secondary heads representatives will therefore be reduced by 1.
- 1.6 Appendix 1 contains a revised membership breakdown by phase and sector.
- 1.7 As a result of this change a vacancy will be advertised to recruit a further primary academy representative.

Recommendation

- 2.1 Schools Forum are asked to note the change in membership profile amendment made in line with the actions agreed in the January Forum meeting.

Appendix 1

Revised Schools Forum Membership Structure (Appendix B The East Sussex Schools Forum Constitution)

	Maintained				Academies & Free Schools		
	Head Teachers	Governor	Other	Total	Total	Total	%
Voting Members							
<i>School</i>							
Primary	5	3		8	3	11	
Secondary	2	1		3	4	7	
Special	1	0		1	1	2	
PRU	1	0		1	0	1	
Total School	9	4	0	13	8	21	81%
<i>Non-school</i>							
Early Years			1	1	0	1	
Dioceses			2	2	0	2	
Professional Associations			1	1	0	1	
16-19 representative			1	1	0	1	
Total Non-school	0	0	5	5	0	5	19%
Total voting membership	9	4	5	18	8	26	100%
Observers							
Lead Member for L&SE							1
Director of Children's Services							1
EFA representative							1
Total observers						3	



Department
for Education

Running small rural primary schools efficiently

Research brief

March 2019

Department for Education



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Introduction

1. This research brief is the Department for Education's interpretative summary of the findings of a qualitative research project commissioned by the department to understand how some small rural schools achieved good educational and financial performance. The summary contains short extracts from case studies which are available in the annex. The research was completed by Aldaba (whose full report is also available¹) with visits taking place in summer term 2018 with a report provided in November 2018.

2. The main aim of the research was to identify evidence of good practice for individual small rural primary schools and collaborations.

3. The department designed a sample of small (under 100 pupils) rural primary schools that data suggested were performing well in terms of their pupil attainment, finances, and Ofsted assessments. Nine standalone schools and twelve multi-academy trusts were visited by Aldaba. 14 telephone interviews were conducted with representatives of stakeholders in the education system, including local authorities (LAs), Dioceses, the department's Regional School Commissioner (RSC) offices, and Ofsted.

Key Findings

Funding context

4. Although schools and trusts were purposefully selected to ensure that those interviewed appeared to have good finances and academic performance, they nevertheless reported that funding is tight and that, in some cases, they struggled to overcome financial difficulties. The main funding challenges highlighted by schools and trusts included:

- Volatility in pupil numbers. A decline in pupil numbers causes a significant percentage drop in the school's budget (although it is also the case that an increase in numbers can be disproportionately advantageous).
- Typically staff are more experienced (therefore more expensive) and less likely to leave than in larger and non-rural schools. This can have educational benefits but can make it difficult to manage staff costs.
- The cost of providing cover for teachers who need training can be high in small schools due to the lack of available cover within the school.

¹ "Running small rural schools efficiently" published by the Department for Education, written by Aldaba Ltd (2019)

- Difficulty in negotiating good purchasing deals for small quantities of goods and services.

Potential solutions to overcoming funding challenges

5. Schools and MATs highlighted a number of areas where they felt efficiencies could be achieved, but these were not without challenges:

- Sharing a headteacher – one headteacher can oversee a number of schools in a MAT, but this is more difficult in a standalone school or where headteachers have a significant teaching role. Some schools worried that sharing a headteacher might lead to a fall in academic performance.
- Securing discounts with external suppliers. Most of the schools and trusts saw the MAT model as offering opportunities to achieve savings, mainly by sharing roles and securing discounts in external supplier contracts, but some schools felt they could achieve these efficiencies under the LA model.

Teaching

6. The research found mixed views on the benefits and challenges facing teachers in small rural schools.

- Some teachers like working in small schools which necessitates undertaking a wider variety of tasks that might not be required in larger schools.
- The main challenge was running mixed-age classes, which can include pupils from two to four different year groups. Some felt teacher training was not designed for these types of classes and limited guidance is available.

Difficulty in offering a broad and balanced curriculum

7. Many schools noted that it can be challenging to offer a broad and balanced curriculum.

- Mixed-age classes mean that the national curriculum is organised into rolling programmes. For example, where pupils from two different year groups share the same class, subjects allocated to the two different year groups in the national curriculum are combined for delivery over two school years.
- A mixed age class in a small rural school amplifies the issue of teaching mixed ability groups. One way of overcoming these challenges is to use online learning packages.

Online learning to challenge high achievers - The Consortium Multi Academy Trust

Schools often have only one or two pupils working towards greater depth objectives. These pupils do not have as much opportunity to engage in meaningful conversations around, in this case, maths mastery with their peers as pupils in larger schools. The trust worked with an online teaching organisation to provide mastery maths lessons which saw results improve. The MAT had to overcome the issue of limited broadband connectivity, an issue that was raised by a number of small rural schools.

Recruitment challenges

8. Schools and trusts highlighted that they face recruitment challenges.
 - Most schools and trusts identified headteachers and senior teaching staff as particularly difficult to recruit, while many also highlighted issues finding lower level admin and supervisory staff.
 - Recruiting to remote rural locations (sometimes with limited and expensive housing) was considered harder than recruiting to urban schools
 - To overcome recruitment challenges schools sought to highlight the benefits of working in small schools, such as a wider variety of roles, more responsibility and the chance to develop the skills necessary to teach mixed age groups.

Benefits for small rural primary schools of joining a MAT

9. A number of findings suggested potential benefits for small rural primary schools from joining a MAT. Examples were provided by MATs and standalone schools. These included:

- achieving efficiencies through a central team;
- managing in-year deficits across schools;
- overcoming recruitment difficulties and offering continuous professional development for teachers; and
- delivering school improvement.

Achieving efficiencies through a central team

10. Standalone schools and MATs felt that the MAT model presented opportunities to make savings through providing central services. The Link Academy trust provided an example of how they made savings through efficient central services.

Efficiencies achieved through a central team in a MAT - Link Academy Trust

The Link Academy Trust is a MAT consisting of nine small rural primary schools. The CEO outlined how they run a central services team including a chief executive, business manager, human resources officer and a range of administrative staff, with legal support and payroll services being provided through centrally run contracts with suppliers. The central team also provides continuous professional development activities to its member academies through contracts with suppliers. The CEO explained the central team cost approximately £400,000 per annum to run but made savings of approximately £800,000, so a net saving of £400,000. The central team also identified benefits that are difficult to quantify, such as enhancing the reputation of all the member academies, engaging with stakeholders about future growth plans, and being recognised regionally and nationally as a potential model for best practice.

Managing in-year deficits

11. Some MATs explained that they gave interest-free loans to the member academies that were experiencing an in-year deficit, subject to a repayment plan that was monitored closely by the trust's central team and which involved paying back the loan within two to four years.

12. Stakeholders (dioceses, RSCs, LAs) agreed that many schools do not appreciate, and current MATs do not fully appreciate, the opportunities for pooling reserves across trusts. Some stakeholders suggested pooling reserves only partially, allowing member academies to keep a proportion of their reserves for themselves but some being used, as required, across the trust.

Overcoming recruitment challenges and offering continuous professional development

13. MATs can run recruitment campaigns for all schools in the trust, but they are also able to offer staff promotion opportunities within the same trust (a point acknowledged by standalone schools). This can help to counter the lack of local labour market opportunities around small schools in isolated locations.

14. MATs highlighted their ability to offer more CPD than standalone schools, with some saying that they provide peer support and a sense of professional community, particularly in the case of more junior staff such as teaching assistants. This support included coaching, which might be facilitated from the trust's central team.

Continuous professional development in a MAT – The Link Academy Trust

The trust monitors the roles available across its academies and estimates likely vacancies and salaries. This enables them to design CPD profiles for the next few years to ensure staff have the necessary skills. Long-term planning means that where staff share training needs, discounts for group bookings can be obtained, making the training cheaper per person. This encourages more strategic planning of CPD.

School improvement

15. School improvement is an area where both standalone schools and multi-academy trusts viewed MATs as being effective. A few trusts referred to their school improvement function as 'quality assurance'.

16. Some MATs have a dedicated school improvement role within their central teams. Staff in this role take the lead in coordinating the school improvement plans for each of the member academies and identifying common priorities that lend themselves to shared activities such as training sessions, class observations, or producing common worksheets and other teaching materials. Some felt that small rural primary schools particularly benefited from these activities because they would have been unaffordable had the schools remained as standalone schools.

17. One MAT (which declined to be a named case study) completed three visits a year to each member academy involving one member of the central team, and two external consultants that worked as school improvement auditors. One of the outputs of the visits was a risk register that estimated the probabilities of member academies underperforming in areas such as finances, leadership, continuous professional development, and pupil attainment. Based on these visits the central team developed a work plan. Schools that faced similar risks were grouped together and offered coaching, training sessions, and opportunities to observe classes at the better performing academies within the trust. Headteachers were also allocated 'buddies' from elsewhere in the trust, which involved peer support and coaching activities facilitated by the central team.

Challenges facing MATs

18. The report highlighted some issues regarding small rural schools that are faced by MATs.

Difficulty in growing trusts to become more sustainable

19. Most trusts saw growth as the best way of achieving a financial balance and becoming sustainable. They considered that by increasing the number of member academies, the contributions from individual members could be reduced and the support received from the central team could be more efficient. However, some felt that encouraging schools to join their MAT had become more difficult with the reduced focus on full academisation (a view endorsed by schools not wishing to join a MAT). MATs emphasised the importance of due diligence to ensure that schools who join share their ethos and that the trust will be able to meet their school improvement and resource needs.

Some LA maintained small rural schools do not wish to convert and join a MAT

20. Most schools understood there were opportunities within MATs around school improvement activities, sharing resources, and potentially achieving savings, but some felt these opportunities were already available as part of other models.

21. Other issues schools mentioned being barriers to joining a MAT:

- The perception that headteacher, and other roles, might be at risk of redundancy or becoming shared across member academies.
- The commitment of Church of England dioceses to maintaining the family of church schools means there is less scope for Church schools to join non-Church MATs.
- Local authorities may not be ready to make the capital investments required to meet the standards that MATs consider to be acceptable before conversion.

Annex 1 - Case Studies

Online lessons at multi-academy trust - The Consortium Multi Academy Trust

Context

This is a large trust with more than ten member academies of different sizes. In the majority of this trust's member academies, especially the smaller ones, there can be at times only one or two pupils working towards greater depth objectives. These pupils do not have as much opportunity to engage in meaningful conversations around maths mastery with their peers as pupils in larger schools.

Practice

To provide pupils with the opportunity to meet their greater depth objectives, the trust worked with an online teaching organisation to provide mastery maths lessons.

The sessions were taught once a week. The pupils were able to login at the same time and, therefore, engage in mathematical challenges and conversations with other pupils working at a similar level of maths.

The programme faced some technical challenges. Internet connections did not always work when the lessons were planned, which resulted in delays and some lessons being re-scheduled.

Results

Pupils reported that, once online and connected, they enjoyed the lessons. Around 50 per cent of the pupils that took part made progress above the trust's expectations.

The trust has plans to improve their approach to greater depth objectives in maths. Whilst there was some improvement in maths, the programme did not always offer the maths mastery conversation that the trust had hoped to offer. This was irrespective of the technical challenges mentioned earlier.

The trust's education team are now investigating in-house systems of connectivity that could be used to provide a similar programme.

Efficiencies made running central services in a MAT – The Link Academy Trust

Context

This is a small trust with fewer than ten member academies, which are all small rural primary schools. The contributions from its member academies to the central team are among the largest in the sample of participating trusts.

Central team services

The central team has a number of roles, including chief executive, business manager, human resources officer, and a range of administrative roles. Legal support and payroll services are provided by the central team through contracts with suppliers. Similarly, the central team also provides continuous professional development activities to its member academies through contracts with suppliers.

Taking everything into consideration, the central team requires an expenditure of approximately £400,000 each year.

Practices

The central team decided to compare this figure with the savings it believes has helped achieve. This was with a view to understanding its cost effectiveness better.

The savings identified by the central team include the following:

- Reduction, relocation, or replacement of teaching staff.
- Use of high-level teaching assistants to reduce expenditure on agency cover teachers.
- Special educational needs resources, and support to disadvantaged pupils provided from the central team, including replacing some roles that used to be hired directly by each individual member academy.
- A cheaper photocopier deal reduced previous photocopier expenditure by 50 per cent, from £4,000 to £2,000
- Bulk purchase of consumables for all member academies, as opposed to separate purchases.
- Funding applications perceived to have been successful as a result of the skills and expertise held by the central team, which was not necessarily available before the trust was set up.
- Information Technology (IT) review resulting in cheaper back-up services, newer and cheaper personal computers for classrooms, cheaper website hosting services, and a free IT review and audit, with total savings amounting to £18,800

Results

In total, the annual savings estimated by the central team were approximately £800,000.

The central team also identified benefits that cannot be quantified, such as contributing to enhancing the reputation of all the member academies, engaging with stakeholders about future growth plans, and being recognised regionally and nationally as a potential model for best practice.

CPD in a multi-academy trust – The Link Academy Trust

Context

This is a small trust with fewer than ten member academies, which are all small rural primary schools. Conscious of the challenges around recruiting staff, this trust developed an approach to monitoring its staff numbers and training needs.

Practice

This trust monitors the types and numbers of roles available across its member academies. Through a set of templates, and associated monitoring work, the trust estimates future staff numbers, including likely vacancies and salaries.

In addition, the trust estimates future needs in relation to continuous professional development for each type of role. For example, at the time of research the trust had this for 2018-19, 2019-20 and 2020-21.

This monitoring work is underpinned by a set of assumptions that are acknowledged and updated as time progresses.

Results

One of the advantages of this approach is that the trust can anticipate future training needs and make decisions that can result in savings. For example, if different individuals will need the same type of training just one year apart, the trust may decide to agree a date in the middle for everyone to participate in the training and secure better prices for a larger group.

Similarly, the trust can anticipate future situations where larger numbers of staff concentrate around a particular type of role and pay scale, and make appropriate decisions in advance, for example, in case other combinations of roles might be more appropriate.

Another feature of this monitoring work is identifying individual members of staff that may be in a position to coach others in the future. Again, this helps the trust to match internal training capacity and needs.



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Schools Forum: ESCC Outline Calendar

Month	Agenda Items	Other related Key Activities
May	Formula Working Group update.	
July	Formula Working Group update to Forum for information and discussion on proposals discussed by FFWG to date. Scheme for Financing Update	ESFA Issues Pre 16 schools funding guidance for forthcoming financial year.
September	Election of Chair and Vice-Chair. Formula Working Group update to Forum for discussion and approval of final proposal (and immediate launch of consultation to schools / academies). Present proposals for De-delegation to obtain approval for forthcoming financial year. Update on DSG (If applicable) i.e DSG Recoupment for academies.	ESFA issues high needs operational guide for forthcoming financial year.
November	Present proposals for Growth Fund and Falling Rolls Fund to obtain approval for forthcoming financial year. ESCC Funding Formula Consultation Update (if applicable). Present proposals for approval of CSSB / Historic Commitments Budget for forthcoming financial year. Update on DSG (If applicable) i.e DSG Recoupment for academies.	DfE to be notified of any agreed changes to funded high needs places in establishments.
December		Local Authority is notified of DSG allocations for forthcoming year.
January	Present DSG budget for forthcoming financial year (reflecting CSSB / Growth and Falling Rolls / De-delegated items previously agreed). Confirm meeting dates for next 12 months. Review of Schools Forum Roles / Responsibilities and Membership.	APT to be submitted to DfE (Budget Share Calculations).
March	Contingency update (De-delegation). Initiate Funding Formula Working Group (FFWG). Update on DSG (If applicable) i.e DSG Recoupment for academies.	

**This is not an exhaustive list and does not include any adhoc agenda items that will be added as and when required during the year.*

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