

# Minutes of Schools Forum

**Monday, 16 January 2023 at 2.30 pm  
in the Council Chamber - Sandwell Council House, Oldbury**

**Present:** N Toplass (Chair)  
M Arnall, S Baker, J Barry, K Bradesha, L Bray, D Broadbent,  
W Lawrence, S Mistry, M Salter and J Topman,

**Officers:** Elaine Taylor, Abi Asimolowo, Moira Talents, Julie Gill, Julie  
Andrews and Connor Robinson

## **1/23** Apologies for Absence

Apologies for absence were received from J Bailey, E Benbow, C Handy-Rivett, D Irish, E Pate, B Patel and D Steen

## **2/23** Declarations of Interest

There were no declarations of interest made.

## **3/23** Minutes

In respect of Schools Funding Consultation 2023-24 – Response Results (minute no. 64/22) noting Question 2 *“Please indicate the option you prefer to use for calculating pupil number growth fund?”* It was requested that it be noted, that schools had been raising the issue of falling rolls for over a year and their concerns had not been appropriately addressed.



**Resolved** that the minutes of the meeting held on 12 December 2022 be approved as a correct record.

**4/23 Named Substitution Appointment**

Schools Forum noted the appointment of M Salter as the named substitute for J Bailey.

**5/23 Dedicated School Grant Allocations and Draft School Budgets 2023/24**

Schools Forum considered the funding allocations for the Dedicated Schools Grant (DSG) and the draft school budget information for 2023/24.

The report allowed school governing bodies and academy boards to start their financial planning for 2023/24 and to make appropriate structural and educational adjustments to meet the needs of young people within the constraints of the resource allocations.

The Department for Education (DfE) had announced the DSG allocations for 2023/24 and had detailed the allocations by block:

<b>DSG Block</b>	<b>Allocation prior to Adjustments</b>	<b>Adjustments</b>	<b>Allocation after adjustments</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>
Schools Block	325.898	(2.716)	323.182
Central School Services	2.306	0	2.306
High Needs	71.519	(3.782)	67.737
Early Years	25.823	0	25.823
<b>Total</b>	<b>425.546</b>	<b>(6.498)</b>	<b>419.048</b>

In addition to the main DSG, the government had also announced additional DSG allocation of £11.021m (called Mainstream Schools Additional Grant - MSAG) payable to mainstream schools. This

replaced the School Supplementary Grant paid to schools in 2022/23. The distribution methodology and schools level allocation Forum noted would be announced in May 2023.

<b>DSG Block (After Adjustments)</b>	<b>2022/23</b>	<b>2023/24</b>
Schools Block allocation	£305.502m	£323.182
Pupil Numbers	56,025	56,462
Central Schools Services Block	£2.249m	£2.306m
High Needs Block allocation	£58.137m	£67.737
Pupil Numbers in special school	832	884
Early Years Block allocation	£23.387m	£25.823m
3 & 4 Year old Universal PTE	5,524	5,517
3 & 4 Year old – Additional 15 Hours PTE	1,592	1,667
2 Year old PTE	1,168	1,331
Early Years Pupil Premium (This funding is included within the “Early Years Allocation above”)	£0.308m	£0.339m

The 2023/24 Early Years Block allocations were indicative, and based on Schools, Early Years and Alternative Provision censuses data from January 2022. The final allocations for each of the funding streams would be based on five-twelfths of the January 2023 census numbers plus seven-twelfths of the January 2024 census numbers.

The High needs block allocations were provisional figures and would be updated in the year. The import/export adjustment would be updated in the summer term 2023 to reflect the latest data from the January 2023 schools census and the RO6 of the 2022 to 2023 Individual Learner Record (ILR). The DfE would make further adjustments in April 2023 to the place funding deductions for the academic year 2023 to 2024 to reflect the outcome of the 2023 to 2024 place change notifications process and to reflect further academy conversions.

#### Schools Budgets 2023/24

The Schools Block funding that had been distributed through the main funding formula was £321,063,416. This had been calculated as follows:

<b>Description</b>	<b>£</b>
Schools Block DSG	325,898,910
Less NNDR	(2,716,494)
Less Pupil Number Growth Contingency	(1,664,000)
Less Transfer from Schools Block to Central Schools Services Block	(455,000)
<b>Schools Block DSG Available to Distribute</b>	<b>321,063,416</b>

Schools Forum was advised that the school funding model would be submitted to meet the DfE deadline of 20 January 2023 for review and final confirmation of the budgets.

#### Proposed Formula

During the consultation there had been perceived issue regarding the EAL factor and clarification was sought from the DfE. Their response was as follows:

“In addition to having to move 10% closer to the NFF you are also required to use each of the factors used in the NFF. This includes EAL3. As you used EAL2 last year we adjust the per pupil rate to 2/3 of the amount used before applying the 10% tightening. This is to reflect the additional pupils that will be funded as a result of moving from EAL2 to EAL3. This is covered in chapter 10 of the operational guide.”

As a result of this Schools Forum was advised that from a school’s perspective they would funding eligible pupils at a lower rate but funding more eligible pupils.

Schools Forum were provided with the factor rates for the local authority formula to be applied to school’s budgets for 2023/24. Those rates presented were subject to decisions by the DfE and or the Cabinet meeting to be held on 18 January 2023:

<b>Factor</b>	<b>2023-24</b>
Primary basic entitlement	3,661.82
KS3 basic entitlement	5,184.44
KS4 basic entitlement	5,274.34
Primary FSM	216.20
Secondary FSM	216.20
Primary FSM6	319.49
Secondary FSM6	587.35
Primary IDACI F	32.11
Primary IDACI E	106.43
Primary IDACI D	498.71
Primary IDACI C	562.12
Primary IDACI B	611.03
Primary IDACI A	661.32
Secondary IDACI F	47.16
Secondary IDACI E	377.71
Secondary IDACI D	693.19
Secondary IDACI C	789.22
Secondary IDACI B	869.84
Secondary IDACI A	939.44
Primary EAL3	579.34
Secondary EAL3	924.84
Primary LPA	1,240.97
Secondary LPA	1,810.11
Primary mobility	112.88
Secondary mobility	163.55
Primary lump sum	135,044.95
Secondary lump sum	135,044.95

Officers introduced the notion of Capping and Scaling to Sandwell. The DfE it was noted allowed overall gains for individual schools to be capped as well as scaled back to ensure that local formulae are affordable. This methodology Schools Forum noted, new to Sandwell as schools move closer to the NFF and it was found that Sandwell local formula was unaffordable and so capping and scaling needed to be applied.

Schools Forums as part of formula modelling, was required to determine how to limit gains. The level remained a local decision and two affordable scenarios had been modelled for Schools Forum decision. There was potential variation to this, where considering the higher the level of capping, the more the number of

schools, would gain but the more severe the level of scaling to ensure the Schools Block was affordable.

Schools Forum was presented with three possible scenarios:

- Scenario 1 – cap school gains at 1.41% and scale at 49.5%
- Scenario 2 – cap school gains at 1.51% and scale at 53%
- Scenario 3 – any other mixture of Capping & Scaling that delivers an affordable Schools Budget.

Forum members questioned the limits of the parameters within capping and scaling in terms of the affordability and the extent to which the cap could be raised. It was recognised that the level of capping and scaling would determine the number of schools impacted. The lower the cap the more schools would gain, but the spread of the gain would be wider, the higher the cap, the greater the gain but for a lower number of schools.

Schools Forum noted that the principal of the cap and scale would be applied equally across schools. Members questioned the ability to make a decision on the information provided.

It was explained to Schools Forum that the move towards capping and scaling was in line with the national funding formula.

The tools used to indicate the impact of capping and scaling across the different schools was demonstrated however Forum members did not want to base a decision of information that was not anonymised.

Forum members indicated that the preferred model would be the one that had the most positive gains across the most schools. Schools Forum moved to a vote on Scenario 1 – cap school gains at 1.41% and scale at 49.5% and it was agreed.

**Resolved that:-**

Scenario 1 – cap school gains at 1.41% and scale at 49.5% be approved for the Capping and Scaling limits to deliver an affordable Schools Block budget.

## Pupil Number Growth Funding and Pupil Number Growth - Additional Needs Funding - Up to March 2023

Schools Forum noted the allocation of pupil number growth funding and considered the additional needs funding to schools experiencing pupil growth.

The updated budget position for Pupil Number Growth Funding for 2022/23 was shared with Schools Forum along with the implications for 2023/24:

Description	Amount
2021/22 underspend B/F into 2022/23	(336,000.00 )
2022/23 Budget	(1,300,000.00)
Total available funding	<b>(1,636,000.00)</b>
Already Paid	854,318.00
Prim to pay (see 4.2 below)	174,317.33
Sec to pay (see 4.2 below)	846,506.15
Add Needs (see 4.3 below)	233,466.31
	<b>2,108,607.79</b>
2022-23 overspent	<b>472,607.79</b>
2023-24 Budget	<b>(1,664,000.00)</b>
2023-24 Revised Budget	<b>(1,191,392.22)</b>

Based on the growth numbers agreed with schools as part of the September 2022 intake, the following amounts were due to the schools listed below:

School	Increase in PAN	Amount to be paid
Lightwoods Primary	30	£58,105.78
St Matthew's C.E. Primary	30	£58,105.78
The Priory Primary	30	£58,105.78
<b>TOTAL PRIMARY</b>		<b>£174,317.33</b>
Bristnall Hall Academy	30	£81,919.95
George Salter Academy	50	£136,533.25
Holly Lodge High	10	£27,306.65

Ormiston Sandwell Community Academy	30	£81,919.95
Q3 Academy Langley	60	£163,839.90
Shireland BioMedical	120	£327,679.80
West Bromwich Collegiate Academy	6	£16,383.99
Wood Green Academy	4	£10,922.66
<b>TOTAL SECONDARY</b>		<b>£846,506.15</b>
<b>TOTAL</b>		<b>£1,020,823.48</b>

Sandwell had traditionally paid growth fund to schools identified as having unusually high number of pupils requiring additional needs. This was based on the increases in IDACI and EAL numbers when compared with previous year's October census. Based on this methodology, the following schools would be entitled to "Additional Needs" growth funding:

School	IDACI Funding (£)	EAL Funding (£)	Total (£)
Lightwoods Primary Academy	4,637.84	2,365.64	7,003.48
Shireland Technology Primary School	7,037.44	14,869.73	21,907.17
St Matthew's C of E Primary School	11,311.06	7,096.92	18,407.98
<b>TOTAL PRIMARY</b>	<b>22,986.34</b>	<b>24,332.29</b>	<b>47,318.63</b>
George Salter Academy	5,447.78	19,938.95	25,386.73
Shireland BioMedical	5,333.18	12,166.14	17,499.32
Q3 Academy Langley	14,552.91	15,207.68	29,760.59
Shireland Collegiate Academy	0	17,911.26	17,911.26
West Bromwich Collegiate Academy	33,050.65	56,106.96	89,157.61
Wodensborough Ormiston Academy	6,432.17	0	6,432.17
<b>TOTAL SECONDARY</b>	<b>64,816.69</b>	<b>121,330.99</b>	<b>186,147.68</b>
<b>TOTAL</b>	<b>87,803.03</b>	<b>145,663.28</b>	<b>233,466.31</b>

Schools Forum was informed that Additional Needs growth funding had been made when there was enough pot of money in the Schools Budget including the growth fund to accommodate such



initiative. Schools Forum understood from information provided that the growth fund would overspend this year which would impact on next year's available budget.

Schools Forum was informed on the lack of the necessary funds to support the Additional Needs growth funding, and if it was agreed the impact it would have on the overspend.

Forum members questioned the implication of the decision to decline the Additional Needs growth funding and questioned why the decision was necessary at this time, highlighting the lack of certainty for schools.

Schools Forum moved to the vote and it was determined that Additional Needs growth funding be rejected.

**Resolved** that:-

The Additional Needs Funding for 2022-23 be rejected.

**7/23**

### **Schools Closedown 2022/23 Timetable**

Schools Forum was advised of the closedown deadlines for maintained schools for the 2022/23 annual accounts. The Government deadline for local authorities to publish their audited accounts was July 2023. Whilst it was acknowledged that the schools Budget/Finance Officer may complete some of the tasks on the schools' behalf it was the responsibility of the Head Teacher to ensure all tasks are completed and that deadlines for submissions are adhered to.

A summary of the critical deadlines had been shared with Schools Forum noting that deadlines were 1pm on:

- 10 February 2023 - Leasing returns
- 10 March 2023 – Timetable of Closedown Templates
- 3 April 2023 – Copy of Bank Statement
- 14 April 2023 – Year End Excel Closedown Template.

Due to an early Easter it was questioned if there was any leeway on the submission dates. It was however stated that the dates were fixed.

Schools Forum noted the report.

## Special Educational Needs High Needs Block 2022/23 November 2022 Monitoring Report

Schools Forum heard that the High Needs Block budget for 2022/23 reported to Schools Forum on 26 September was £60.808M, net of deductions. The balance brought forward as at 1 April 2022 was £3.930M surplus.

It was anticipated that in year surplus as at 31 August 2022 projected to 31 March 2023 based on the updated Grant that was previously reported to Schools Forums was £1.040M. The current position as at 30 November 2022 projected to 31 March 2023 was now an in-year deficit of £1.266M.

Officers reported on the variations to the High Needs Block and Schools Forum noted:

### Variation 1 – Independent Schools

Out of borough placements, showed a budget pressure of £2.310M. This was an increase of £1.851M on previously reported figures following more pupils being placed in independent special and independent mainstream schools, due to a lack of provision available within Borough. The Placement and Provision Panel had been placing 2-3 pupils per week. Any agreed placements had been included in the forecast figures together with a contingency of £500K for additional SEN placements and £200K for tri-part funded placements agreed with Sandwell Social Care Trust for any placements during the Spring Term.

### Variation 2 – Mainstream Schools

There had been an increase in both EHCP assessments and the funding of early years pupils which had resulted in a pressure of £683k in delegated funding to school for individual pupil support.

### Variation 3 – Focus Provision Schools

There had been an increase in EHCP assessments which had resulted in a projected overspend of £175K on the delegated funding provided to Focus Provisions.

### Variation 4 – SEN Special Unit

A new Special Unit had been agreed at Uplands Primary School.

### Variation 5 – High Point Special School

There are more pupils on roll at High Point from 1 September 2022 than was anticipated when the budget was prepared. Therefore, there was a pressure of £186K.

#### Variation 6 – Early Years

An amount of £480k from the Early Years Grant was used to offset the early support for pupils in private provider settings and those in mainstream early years settings. Predicted costs in private provider settings has increased from £660K previously reported to £710K. The support for EYS pupils in mainstream schools was set against the schools' delegation and not shown separately. The £480k would be insufficient to cover the full costs of meeting the needs of the pupils in the early years settings. There was a pressure of £230K against private providers alone.

#### Variation 7 – Recoupment

The Element 3 top up costs of pupils placed in Sandwell schools that are the responsibility of a neighbouring LA are funded by Sandwell for all pupils in the special schools and LAC pupils placed in mainstream schools. This was recouped from the relevant authority. There had been an increase in pupils being placed which had resulted in an increase in recoupment income, with Shenstone being the highest importer of pupils due mainly to the location of the school.

#### Variation 8 – Albright Education Centre

A small number of pupils had been placed temporarily at Albright Education Centre pending a permanent placement being agreed. These had been funded E3 Top up for the period of occupancy.

#### Variation 9 – SEN and Support for Inclusion Services

The total variances equated to a saving of £347K across 10 service areas. These were mainly due to staff turnover, maternity leave, opting out of the LA superannuation scheme and full time budgeted posts covered by staff on reduced hours and the inclusion of 2022/23 pay awards. The savings within these areas would increase during the year following slippage in staff appointments.

#### Variation 10 SEN

SEN Developments was showing an underspend of £1.3M – This budget head currently covers independent appeals and reports. It also holds the HNB surplus balancing figure of £630K, which was the difference between the calculated budgets as at 1 April 2022

and the HNB Grant initial settlement 2022/23 as well as the additional grant received in July 2022.

Schools Forum noted the continued increasing pressures on the High Needs Block both stemming from the increase in children and young people accessing the service and the span of the service now reaching to 25 years. The number of children and young people requiring an EHCP was not stabilising and continued to increase.

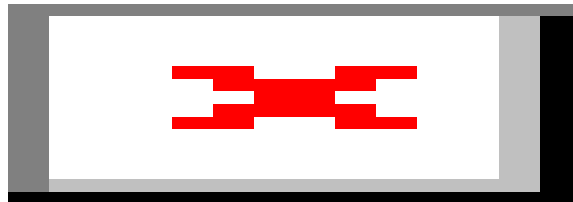
Compared to regional neighbours Schools Forum was informed that the figures were positive, however, it was understood that if the deficit continued to increase DfE intervention may be implemented.

Schools Forum noted the report

**9/23**

## **AOB**

Schools Forum noted the 2022/23 DSG Allocations.



Schools Forum heard that there was no major announcements with regards to the Fair Funding Formula, if any change was being considered, it was noted that if a change was being considered schools would be consulted.

Schools Forum extended its thanks to Moira Talents who had announced she was leaving Sandwell Council, and wished her all the best for the future.

Meeting ended at Time Not Specified

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