

# Agenda Schools Forum

**Monday 15 January 2024 at 2.30 pm  
in Annexe 2 - Sandwell Council House, Oldbury**

- |   |   |         |
|---|---|---------|
| 1 | <b>Apologies for Absence.</b>   | 11 - 12 |
|   | To receive any apologies for absence.   |         |
| 2 | <b>Declarations of Interest</b>   | 13 - 14 |
|   | Members to declare any interests in matters to be discussed at the meeting.   |         |
| 3 | <b>Minutes</b>  | 15 - 32 |
|   | To confirm the minutes of the meetings held on 6 November and 11 December 2023 as a correct record.                             |         |
| 4 | <b>Dedicated Schools Grant Allocations and Draft Budgets 2024/25</b>  | 33 - 44 |
|   | To note the Dedicated Schools Grant Allocations and Draft Budgets 2024/25 and note the use of the capping and scaling exercise. |         |
| 5 | <b>Schools Closedown Timetable 2023/24</b>  | 45 - 48 |
|   | To note the Schools Closedown Timetable 2023/24.  |         |



## 6 **Future Meeting Dates**

All meetings are in person at the Sandwell Council House.

- 18 March 2024
- 1 July 2024

## 7 **AOB**

Safeguarding arrangements and the exploration of a DSG contribution.

Workstreams and SEND Working Group

**Shokat Lal**  
**Chief Executive**  
Sandwell Council House  
Freeth Street  
Oldbury  
West Midlands

**Distribution**

N Toplass (Chair)

J Barry, M Arnull, S Baker, D Barton, E Benbow, L Bray, D Broadbent,  
J Farmer, G Faux, K Featherstone, Flowers, A Gilbert, C Hadley, C Handy,  
K Hazlewood, W Lawrence, L Mason, S Mistry, L Moore, R Reed, C Spooner,  
D Steen, J Topham and Union

Contact: [democratic\\_services@sandwell.gov.uk](mailto:democratic_services@sandwell.gov.uk)

## Schools Forum Distribution to Members:

<b>Body / Number of positions on Forum</b>	<b>Nominated Member</b>	<b>Nominated Substitute</b>
<b>Head Teachers Advisory Forum – Maintained Primary Schools (5)</b>	Sally Baker Jamie Barry Wendy Lawrence Alison Gilbert Seema Mistry	Lynne Paino Alison Connop Sarah Penny Andrew Dickinson Kelly Duff
<b>School Governors – Maintained Primary Schools (2)</b>	Deborah Steen Elaine Benbow	Nomination awaited Nomination awaited
<b>Head Teachers Advisory Forum – Maintained Secondary Schools (1)</b>	Christina Handy-Rivett	Mike Smith
<b>School Governors – Maintained Secondary Schools (1)</b>	Dawn Broadbent	Nomination awaited
<b>Special School (Maintained) (1)</b>	Oliver Flowers	Nomination awaited
<b>Pupil Referral Unit (Maintained) (1)</b>	Kate Hazelwood	Nomination awaited
<b>Academies Primary (3)</b>	Lucy Bray Rob Reed Joe Farmer	Nomination awaited Nomination awaited Helen Heap
<b>Academies Secondary (6)</b>	Mark Arnull James Topham Leigh Moore George Faux Lisa Mason Keziah Featherstone	Nomination awaited Nomination awaited Nomination awaited Nomination awaited Nomination awaited Nomination awaited
<b>Special Academies</b>	Neil Toplass	Nomination awaited
<b>Trade Union (1)</b>	Darren Barton	Phil Jones
<b>Early Years Partnership (1)</b>	Claire Spooner	Nomination awaited
<b>14-19 Provider (1)</b>	Claire Hadley	Robert Pickup

## Schools Forum: Voting Blocks (Who can vote and on what?)

<b>Primary Maintained Block</b>	<b>Voting</b>
	Can vote on all business except secondary school de-delegation.
<b>Headteachers</b>	
Sally Baker	
Jamie Barry	
Alison Gilbert	
Wendy Lawrence	
Seema Mistry	
<b>Governors</b>	
Deborah Steen	
Elaine Benbow	

<b>Secondary Maintained Block</b>	<b>Voting</b>
	Can vote on all business except primary school de-delegation.
<b>Headteachers</b>	
J Christina Handy-Rivett	
<b>Governors</b>	
Dawn Broadbent	

<b>Special Block</b>	<b>Voting</b>
Oliver Flowers	Can vote on all business except primary and secondary school de-delegation and education functions.

<b>Academies Block</b>	<b>Voting</b>
Lucy Bray (Primary)	Can vote on all business except primary and secondary school de-delegation and education functions.
Rob Reed (Primary)	
Joe Farmer (Primary)	
James Topham (Secondary)	
Mark Arnull (Secondary)	
Leigh Moore (Secondary)	
George Faux (Secondary)	
Lisa Mason (Secondary)	
Keziah Featherstone (Secondary)	

## Schools Forum: Voting Blocks (Who can vote and on what?)

### Continued...

<b>Special Academies (1)</b>	<b>Voting</b>
Neil Toplass	Can vote on all business except primary and secondary school de-delegation and education functions.

<b>Pupil Referral Unit</b>	<b>Voting</b>
Kate Hazelwood	Can vote on all business except primary and secondary school de-delegation and education functions.

### **NON-SCHOOL MEMBERS**

<b>Early Years Partnership</b>	<b>Voting</b>
Claire Spooner	Can vote on all business except primary and secondary school de-delegation and education functions.

<b>Trade Union</b>	<b>Voting</b>
Darren Barton NUT	Can vote on all business except primary and secondary school de-delegation and school funding formula.

<b>16-19 Provider</b>	<b>Voting</b>
Claire Hadley	Can vote on all business except primary and secondary school de-delegation and school funding formula.

## **Schools Forum: Quorum**

- (a) A meeting will only be quorate if 40% of the total active membership is present (Voting Members Only). Where a nominated substitute member is in attendance on behalf of a duly appointed member, he/she shall be included in the number of persons present for the purposes of determining if a quorum has been achieved.
- (b) If the meeting is inquorate, it will be able to proceed but cannot legally take decisions (E.g. Election of a Chairperson, or a decision relating to funding conferred by the funding regulations). An inquorate meeting can respond to authority consultation and give views to the authority. The authority can take account of such views

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## Schools Forum

### Apologies for Absence

To receive any apologies for absence from the members of Schools Forum.



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## Schools Forum

### Declarations of Interest

Schools Forum members to declare any interests in matters to be discussed at the meeting.



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## Minutes of Schools Forum

**Monday 6 November 2023 at 2.30 pm  
in the Council Chamber, Sandwell Council House, Oldbury**

**Present:** N Toplass (Chair)  
J Barry (vice-chair), M Arnull, S Baker, E Benbow, G Faux,  
K Featherstone, O Flowers, C Handy, K Hazlewood,  
W Lawrence, L Mason, L Moore, M Pickup (substitute) and  
J Topham.

**Officers:** Michael Jarrett (Director of Children's Services and  
Education) – (Attended Virtually)  
Julie Andrews (Assistant Director - Education Services)  
Elaine Taylor (Finance Business Partner)  
Connor Robinson (Democratic Services Officer)

**In Attendance:** Councillor Hackett (Cabinet Member for Children, Young  
People and Education)  
Phil Jones (Union Representative)

### 41/23 **Election of Chair**

Nominations had been sought for the position of Chair of Schools Forum for a period of two years. No nominations had been received. Neil Toplass indicated he was willing to Chair for the duration of the meeting.

**Resolved** that Neil Toplass is elected Chair for the duration of the meeting.



42/23 **To note the new Academy Secondary Representatives**

The Forum noted Leigh Moore, George Faux, Lisa Mason and Keziah Featherstone as the new Academy Secondary Representatives.

43/23 **Apologies for Absence**

Apologies for absence were received from D Broadbent, D Steen, S Mistry and K Duff (Substitute Member).

44/23 **Declarations of Interest**

No declarations of interest were made.

45/23 **Minutes**

Forum members requested an update on the concerns raised over the Council moving to the Oracle Fusion system. Conversations had been taking place involving HR and Finance with head teachers and issues raised had been fed back to the Oracle Fusion team. A draft SLA template had been created and was in the process of being reviewed. The Council had heard the concerns raised and details of the next phase would be communicated with heads.

The move to Oracle Fusion had raised concerns around pension administration and the cost of the statutory service. Since it had been raised previously a question and answer brief had been circulated, the Finance team was aware of a number of concerns that had been raised and it was hoped these could be addressed going forward. Forum was advised that decisions on Oracle Fusion take place outside of Forum meetings.

Forum was advised that the number of workstreams was under review and it was acknowledged that reducing the number would be beneficial. Forum had paused its SEND Working Group in light of





the workstreams, and members sought assurance that the work being undertaken as aligned with Forum.

The Director of Children's Services and Education addressed Forum virtually and updated them on a number of issues and concerns Forum had raised regarding the High Needs Block monitoring report. It was accepted that the Local Authority had failed to produce the High Needs Block monitoring report this academic year. Work had been undertaken to address the staffing issues and the Council was confident that a report would be produced for the December meeting. To prevent a similar situation occurring in the future work was underway to ensure multiple officers were trained and confident in compiling and producing the report.

Phil Jones addressed Forum around concerns members had expressed over the use of Union Facilities Time. Forum heard that schools needed to be supported and the funding mechanism allowed the support to be delivered. While individuals paid their subscriptions, this was not sufficient to employ a local representative and therefore the de-delegated funding was required to employ the service. It was also recognised that the service provided was predominantly accessed by the primary schools.

Concerns were raised over the adequacy of the service provided. In response it was noted that all but one policy document on the website had been updated and that if members had had difficulty accessing resources it may be due to the online resources moving to a new platform. All Unions recognised by the Council were funded through the Union Facilities Time and the percentage of the funding allocated to them was dependent on union membership.

**Resolved** that the minutes of the meeting held on 2 October 2023 be approved as a correct record.



## 2024-25 Schools Funding Consultation

Forum considered the 2024/25 Draft Schools Funding Consultation document to be issued to schools and academies.

The Consultation Document for schools for 2024/25 included seven questions.

Question one - would ask schools to indicate the preferred model in calculating school funding for 2024/25:

- Option one – Minimum Transition
- Option two – Accelerated Transition
- Option three – National Funding Formula Factor Values

Description	NFF FACTOR VALUES 2024/25		NFF FACTOR VALUES 2023/24		SMBFC FACTOR VALUES 2023/24		Difference Between v SMBFC 2023/24		MODELLING OPTION 1 1 - (4 X 90%)		MODELLING OPTION 2 1 - (4 X 80%)		MODELLING OPTION 3 NFF	
	1	2	1	2	1	2	4 - 2 - 3	4 - 2 - 3	Primary	Secondary	Primary	Secondary	Primary	Secondary
<b>EXAMPLE</b>	<b>£1,050.00</b>	<b>£1,000.00</b>	<b>£1,000.00</b>	<b>£1,000.00</b>	<b>£600.00</b>	<b>£600.00</b>	<b>£400.00</b>	<b>£400.00</b>	<b>£690.00</b>	<b>£690.00</b>	<b>£730.00</b>	<b>£730.00</b>	<b>£1,050.00</b>	<b>£1,050.00</b>
Primary (Years R-6)	£1,562.00	£1,394.00	£1,394.00	£1,394.00	£3,661.82	£3,661.82	(£267.82)	(£267.82)	£3,803.04	£3,803.04	£3,776.26	£3,776.26	£3,562.00	£3,562.00
Key Stage 3 (Years 7-9)	£5,022.00	£4,785.00	£4,785.00	£4,785.00	£5,184.44	£5,184.44	(£399.44)	(£399.44)	£5,381.50	£5,381.50	£5,341.55	£5,341.55	£5,022.00	£5,022.00
Key Stage 4 (Years 10-11)	£5,661.00	£5,393.00	£5,393.00	£5,393.00	£5,274.34	£5,274.34	£118.66	£118.66	£5,557.05	£5,557.05	£5,556.07	£5,556.07	£5,661.00	£5,661.00
<b>Additional Needs Funding</b>	<b>Primary amount pp</b>	<b>Secondary amount pp</b>	<b>Primary amount pp</b>	<b>Secondary amount pp</b>	<b>Primary amount pp</b>	<b>Secondary amount pp</b>	<b>Primary</b>	<b>Secondary</b>	<b>Primary</b>	<b>Secondary</b>	<b>Primary</b>	<b>Secondary</b>	<b>Primary</b>	<b>Secondary</b>
FSM	£490.00	£490.00	£480.00	£480.00	£216.20	£216.20	£263.80	£263.80	£252.84	£252.84	£278.96	£278.96	£490.00	£490.00
FSM6	£820.00	£1,200.00	£705.00	£1,030.00	£319.49	£587.35	£385.51	£442.65	£473.77	£802.69	£511.59	£845.88	£820.00	£1,200.00
IDAC1 Band F	£235.00	£340.00	£230.00	£335.00	£32.11	£47.16	£197.89	£287.84	£57.02	£81.12	£76.59	£109.73	£235.00	£340.00
IDAC1 Band E	£285.00	£450.00	£280.00	£445.00	£106.43	£377.71	£173.57	£67.29	£128.94	£389.66	£146.14	£396.17	£285.00	£450.00
IDAC1 Band D	£445.00	£630.00	£440.00	£620.00	£498.71	£693.19	£58.71	£73.19	£497.84	£695.87	£491.97	£688.55	£445.00	£630.00
IDAC1 Band C	£485.00	£690.00	£480.00	£680.00	£562.12	£789.22	(£82.12)	(£109.22)	£558.91	£788.30	£550.70	£777.38	£485.00	£690.00
IDAC1 Band B	£515.00	£740.00	£510.00	£730.00	£611.03	£869.84	(£101.03)	(£139.84)	£605.93	£865.86	£595.82	£851.87	£515.00	£740.00
IDAC1 Band A	£680.00	£945.00	£670.00	£930.00	£661.32	£939.44	£68.68	£94.44	£672.19	£953.50	£673.06	£952.55	£680.00	£945.00
EAL	£590.00	£1,585.00	£580.00	£1,565.00	£579.34	£934.84	£0.66	£640.16	£589.41	£1,009.66	£589.47	£1,072.87	£590.00	£1,585.00
Low Prior Attainment	£1,170.00	£1,775.00	£1,155.00	£1,750.00	£1,240.97	£1,810.11	(£85.97)	(£60.11)	£1,247.37	£1,829.10	£1,238.78	£1,823.09	£1,170.00	£1,775.00
Mobility	£960.00	£1,380.00	£945.00	£1,360.00	£112.88	£163.55	£832.12	£1,196.45	£211.59	£309.90	£294.30	£422.84	£960.00	£1,380.00
Lump Sum	£134,400.00	£134,400.00	£128,000.00	£128,000.00	£135,044.95	£135,044.95	(£7,044.95)	(£7,044.95)	£140,740.46	£140,740.46	£140,035.96	£140,035.96	£134,400.00	£134,400.00

In relation to question one, the options were presented with an assumption that the Council would allocate £1.60m for the Growth Fund and that Schools Forum and all schools would support the top-slice of the Schools Block to fund the Attendance service to £0.512m.

There was also an assumption that the De-delegated and Education Functions options proposed by Officers would also be accepted.

The Finance Business Partner confirmed that all three options would be shared with schools and Forum was being asked to agree the questions not the outcome.



Question two – would ask if schools agreed (yes/no) to the use of the Brought Forward of a £0.282m to set the Pupil Number Growth Fund at £1.60m?

At the end of the 2022/23 financial year there was a Pupil Number Growth (PNG) Funding carry forward of £0.282m. The PNG required for 2024/25 was estimated to be £1.90m and so it was proposed that the growth funding be set at £1.6m (rounded) within this consultation.

Question three – would ask if schools would agree (yes/no) to the introduction of a Falling Rolls Fund?

Two Falling Rolls Fund modelling options had been presented to the Forum at their meeting of 2 October 2023. The criteria detailed in Option 2 for allocating this fund had been approved.

Forum questioned why schools were being asked to agree to the establishment of the Falling Rolls Fund since Forum had agreed to the proposal at the previous meeting. Some Forum members questioned why Forum had been asked to make a decision originally if the question was going to be posed to schools. Some Forum members thought the question would allow for an understanding of how schools think of the decision to establish a Falling Rolls Fund.

Question four – would ask if schools agreed (yes/no) to the top slice of £512,000 from the Schools Block to the Central Schools Services Block to fund the Attendance Team?

The Attendance Service was a legitimate function that could be funded from the Central Schools Services Block (CSSB) and was a statutory service from the Council for all schools.

Question five – asked if schools agreed (yes/no) with the indicative allocation of the Central Schools Services Block funding proposals? (For each proposal).



<b>CSSB1</b>	Statutory/Regulatory/ Education Welfare/Asset M	<b>£1,801,593</b>
<b>CSSB2</b>	Schools Forum	<b>£3,000</b>
<b>CSSB3</b>	Admissions Services	<b>£452,600</b>
<b>CSSB4</b>	Historical Commitment - Pensions Administration	<b>£93,376</b>
	<b>TOTAL CSSB (Provisional - Updated Decemb</b>	<b>£2,350,569</b>
<b>CSSB5</b>	Safeguarding & Attendance (ALL Schools)	<b>£512,000</b>

The provisional 2024/25 funding allocation for the CSSB was announced in July 2023 by the DfE and was £2.350m. This was made up of £2.257m of on-going responsibilities and £0.093m of historic commitment.

Question six – for maintained schools only - asked if schools agreed (yes/no) with the dedelegated proposals.

There were five de-delegated proposals to be considered by maintained schools:

<b>DD1</b>	Health and Safety Licenses and Subscriptions	<b>£5,800</b>
<b>DD2</b>	EVOLVE Annual Licence Fee	<b>£7,300</b>
<b>DD3</b>	Union Facilities Time	<b>£159,000</b>
<b>DD4</b>	School Improvement Services	<b>£150,000</b>
<b>DD5</b>	Schools in financial difficulty	<b>£100,000</b>
	<b>TOTAL DD</b>	<b>£422,100</b>

Question seven - for maintained schools only - asked if schools agreed (yes/no) with de-delegated proposals.

There were two Education function proposals to be considered by maintained schools.

<b>EF1</b>	Education Benefits Team	<b>£134,000</b>
<b>EF2</b>	Children's Clothing Support Allowance	<b>£33,000</b>
<b>EF3</b>	Safeguarding & Attendance	<b>moved to CSSB5</b>
	<b>TOTAL EF</b>	<b>£167,000</b>

The Finance Business Partner confirmed that an online briefing session would be held to allow schools to drop in and answer any questions.



It was agreed that the consultation deadline should take into account the primary and secondary partnership meetings and allow for schools to raise any issues or concerns they have on the consultation.

The Finance Business Partner confirmed that the spreadsheet detailing the financial implications to schools of the models option in question one would be accessible via a link within the virtual office.

**Resolved** that:

(1) Schools Forum approve the 2024/25 Draft Schools Funding Consultation questions one – five;

(2) Maintained schools approve the 2024/25 Draft Schools Funding Consultation questions six and seven.

#### 47/23 **Special School in Financial Difficulty**

Forum members were reluctant to consider the creation of the Special School in Financial Difficulty Fund to be funded from High Needs Block, due to the lack of information on the current High Needs Block expenditure.

**Resolved** that Special School in Financial Difficulty report be deferred to a future meeting to allow for a detailed High Needs Block Monitoring report to be produced and presented to Schools Forum.

#### 48/23 **Constitution Working Group Appendix**

The Forum Constitution and membership structure had updated and agreed in June 2023. An additional appendix had been created to set out the details around how Working Groups of the Forum would be organised and facilitated.

The appendix reflected DfE guidelines plus suggestions that will allow the Local Authority to facilitate Forum Working



Groups effectively.

Forum asked that provision be allowed for more than one Working Group to be in operation at any one time. The Democratic Services Officer confirmed that the change would be made, however, administrative support would be required from schools and the Education Service.

**Resolved** that approval is granted to the Working Group Appendix to be added the constitution.

#### 49/23 **Future Meeting Dates**

The Forum noted the future meeting dates:-

- 11 December 2023
- 15 January 2024
- 18 March 2024
- 1 July 2024

#### 50/23 **AOB**

Forum members considered the establishment of a number of Working Groups as they related to SEND provision and the Building Schools for the Future (BSF) and Private Finance Initiatives (PFI).

While the Working Group on SEND provision would benefit from additional information on current service workstreams and High Needs Block monitoring, Forum members stressed the importance of BSF/PFI and the need to take action.

**Resolved** that the Building Schools for the Future (BSF) and Private Finance Initiatives (PFI) be established.

Meeting ended at 4.24pm

Contact: [democratic\\_services@sandwell.gov.uk](mailto:democratic_services@sandwell.gov.uk)



# Minutes of Schools Forum

11 December 2023 at 2.30 pm  
in the Council Chamber, Sandwell Council House, Oldbury

**Present:** **Maintained Primary**  
S Baker, J Barry (Vice-Chair), K Duff (substitute), A Gilbert  
and W Lawrence.

**Maintained Secondary**  
C Handy-Rivett.

**Maintained Special Schools**  
O Flowers.

**Governors**  
E Benbow and D Broadbent.

**Academy Primaries**  
L Bray, J Farmer and R Reed.

**Academy Secondaries**  
M Arnull, G Faux, K Featherstone, L Mason and J Topham.

**Special Academy**  
N Toplass (Chair).

**Early Years Partnership**  
C Spooner.

**16-19 Provider**  
C Hadley.

**Officers:** Michael Jarrett (Director of Children's Services and  
Education), Julie Andrews (Assistant Director - Education)



Services), Abi Asimolowo (Head of Financial Business Partnering-People), Elaine Taylor (Finance Business Partner), P Harvey (Finance Business Partner) and Stephnie Hancock (Deputy Democratic Services Manager).

### 51/23 **Election of Chair**

In the absence of nominations for Chair, Neil Toplass indicated that he would take the Chair for a period of two years.

Jamie Barry confirmed that he would continue as Vice-Chair.

**Resolved** that Neil Toplass is elected Chair for a two year period.

### 52/23 **New Representatives**

The Forum welcomed new members Alison Gilbert (Primary Partnership); Rob Reed and Joe Farmer (Academy Primaries) and Claire Spooner (Early Years Partnership) to their first meeting.

### 53/23 **Apologies for Absence**

Apologies for absence were received from K Hazlewood and Leigh Moore.

### 54/23 **Declarations of Interest**

No declarations of interest were made.

### 55/23 **Minutes**

Forum members questioned why discussions around Oracle Fusion had not been included in the minutes. It was determined that the minutes be deferred to seek clarification.





**Resolved** that confirmation of the minutes of the meeting held on 6 November as a correct record is deferred until the next meeting.

## 56/23 **2024-25 Schools Funding Consultation – Response Results**

Further to Minute No. 46/23 (6 November 2023), the Forum received the responses to the Draft Schools Funding Consultation 2024-25, which had had been issued to schools and academies on 10 November 2023 and contained seven questions. Stakeholder meetings to explain the overriding principles within the consultation had been held between 8 and 23 November 2023.

There had been a 57% response rate, which was similar to previous years.

It had been made clear in the consultation that that there were assumptions within the modelling options in Question One (listed below) that would make it difficult to give any certainties over funding for 2024/25.

- The modelling assumed a growth fund of £1.6m.
- The modelling assumed £0.512m transfer of funding from the Schools Block to the Central Schools Services block.
- The data modelled had used the October 2022 census data.
- The Mainstream Schools Additional Grant would be rolled into the Dedicated Schools Grant (DGS) for 2024/25.

The Forum was asked to define the funding setting processes for all schools and academies for the next financial year, which would assist schools in preparing strategic plans and creating viable budgets, staffing and curriculum plans.

It was noted that, whilst the views of all stakeholders, including the Forum, would be taken into consideration, setting the budget was a local authority decision.

From the questions and comments from Forum members, the following was highlighted:-



- There was no historical yardstick with which to estimate how much a Falling Rolls Fund would contain and the figure would not be confirmed until the October 2023 Schools Census results were published, which was likely to be January 2024.
- Under the Schools Operational Guidance 2024-25, and previous years' Census data, no schools would have qualified for support from the Falling Rolls Fund.
- Affordability assessments would be carried out to ensure that all funds were distributed appropriately, and capping and scaling would have to take place if necessary.
- The indicative allocation breakdown in relation to the Central Schools Services Block (CSSB) was based on an historical national figure agreed by government.
- The CSSB covered all schools.
- Clarity would be sought around the costs to schools if they chose not to use the Council's human resources service for pensions administration.
- Clarity would be sought on whether secondary schools were required to have health and safety licenses.
- Schools could access a maximum of £100k from the Schools in Financial Difficulty Fund. It was difficult to estimate how much the fund should contain and recognised that if a number of schools sought support, the fund would reduce quickly.
- Clarity would be sought on the balance of facilities time carried forward.
- The criteria for accessing the Clothing Support Allowance fund would be reviewed.

**Resolved** that the Forum's decisions, in relation to the funding setting processes for all schools and academies for 2024-25 (Appendix 1); along with the comments received as part of the stakeholder consultation (Appendix 2), are submitted to the Cabinet for consideration in the Council's budget setting for 2024-25.



## 2023/24 Dedicated Schools Grant (DSG) Budget Monitoring – Period 7

The Forum noted the position in relation to the Dedicated Schools Grant (DSG) up to 31 October 2023.

The DSG was forecasting an in-year surplus of £1.593m. When added to the surplus at the end of 2022/23 of £5.560m, the overall position was a forecast surplus of £7.153m. The detailed explanation for the variances within each block was noted.

From the questions and comments from Forum members, the following was highlighted:-

- Work would be taking place to identify how take -up of the Disability Access Fund could be increased.
- Members expressed disappointment that an application had not yet been made to the Department for Education in relation to utilising Private Finance Initiative (PFI) and Exceptional Premises factors. The Forum would need to consider the matter formally before an application could be made and this would be progressed in the next financial year.
- Governance structures had now been established to address BSF issues and this was a priority for the local authority. The Director of Children’s Services and Education assured members that he was in regular dialogue with the DfE.
- Sandwell was in a unique position with regards to holding a surplus on its High Needs Block and this was being monitored closely. Special Educational Needs and Disability services were being reviewed and the review would inform the development of a SEND Strategy upon which to base future spending decisions.



## Special Educational Needs and Disabilities (SEND) 2023/24 High Needs Block Budget Monitoring

The Forum noted the position in relation to the Special Educational Needs and Disabilities (SEND) 2023/24 High Needs Block Budget up to 31 October 2023.

Taking account of recoupment of £4.190m by the Department of Education (DfE) for academies, free schools and post-16 commissioned places, there was a net surplus £67.309m. The detailed explanation for relevant variances was noted.

Sandwell was in a good position; however, caution was being exercised in determining the priorities for use of the surpluses. The primary pressures related to post-16 provision and out of borough placements. EHCPs for the 123 children currently accessing independent schools and out of borough placements were being reviewed to establish whether there were any common themes that would enable the local authority to explore in-house provision through development of more focus provision units or expansion of existing focus provision.

It was noted that the local authority was currently responding two tribunal cases, which, if successful, would place further pressure on budgets so again, caution was being exercised to ensure that surpluses would be spent appropriately.

Pressure on Speech and Language Therapy (SALT) budgets was common and there had been a significant increase in demand in early years provision since the pandemic.

From the questions and comments from Forum members, the following was highlighted:-

- Neighbouring local authorities had different challenges to address and so their High Needs Block positions varied.
- It was important to involve practitioners from all disciplines in decisions on spend of the HNB surplus.



- The DfE had acknowledged that funding for special schools had been static.
- While the need for caution was acknowledged, this needed to be balanced against the lived experience of Forum members and it was important to provide support to those children and schools who needed it now, which would reduce the risk of further tribunals.
- There was a minimum funding guarantee of 3% by government.
- The settlement from the DfE was expected on 22 December.
- The review of SEND provision was underway and would provide an opportunity to review and re-set funding for schools for SEND provision. The departure of the Director of Children's Services and Education in February 2024 would not affect the review.

## 58/23 **Special Schools in Financial Difficulty**

Further to Minute No. 47/23, the Forum considered the establishment of a fund, funded from the High Needs Block, to support special schools and alternative provision establishments experiencing financial difficulty.

The fund would provide bridging support, in form of cash flows, to schools whilst they worked with the local authority to overcome the financial pressure. It was proposed that the fund would not exceed £500k, with limits on how much a school could apply for each year, and would be topped up as required.

Maintained mainstream schools, through de-delegation of their schools' budget, had created a Schools in Financial Difficulty Fund. However, Special Schools (both maintained and academies) had no similar support.

The Director of Children's Services and Education reported that the Orchard School had approached the local authority for financial support. The DfE was currently working with the school and had made a number of recommendations, which were being implemented. Whilst the Director of Children's Services and



Education had authority to provide financial support to the school, in the spirit of collaboration and mutual support, the Forum was asked to give its approval. The Forum was assured that the local authority would work with the school on how the funds would be spent, taking into account the DfE's recommendations, as well as the immediacy of the cashflow situation.

Members expressed caution around setting up a fund in the absence of a SEND strategy. However, the need to support The Orchard School now was acknowledged and the Forum was minded to give its support to an injection of cash from the High Needs Block, up to an amount to be agreed by the Director of Children's Services and Education.

Consideration of the establishment of a fund for Special Schools in Financial Difficulty would be re-visited at a future meeting, following the completion of the SEND review and the development of a SEND strategy.

### **Resolved:-**

- (1) that approval is given to the provision of financial support to The Orchard School, at an amount to be determined by the Director of Children's Services and Education, to address its immediate financial challenges;
- (2) that, following the completion of review of SEND provision in Sandwell and the development of a SEND strategy, a further report is submitted to the Forum to consider the establishment of a fund to support special schools in financial difficulty.

50/23

### **AOB**

The Forum was informed that the working group on Building Schools for the Future and Private Finance Initiative had held its first meeting on 8 December 2023.



Meeting ended at 4.47pm

Contact: [democratic\\_services@sandwell.gov.uk](mailto:democratic_services@sandwell.gov.uk)



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## Report to Schools Forum

**15 January 2024**

<b>Subject:</b>	Dedicated Schools Grant Allocations and Draft Budgets 2024/25
<b>Director:</b>	Director of Childrens Services, Michael Jarratt
<b>Contact Officer:</b>	Finance Business Partner, Elaine Taylor elaine_taylor@sandwell.gov.uk

### 1 Recommendations


- 1.1 That Schools Forum members note the Dedicated Schools Grant Allocations and Draft Budgets 2024/25.
- 1.2 That schools Forum notes the use of the capping and scaling exercise that delivers an affordable Schools Block budget.

### 2 Reasons for Recommendations

- 2.1 The Schools Forum Regulations 2012 requires that the Schools' Forum meets regularly and is consulted by the local authority concerning the Dedicated Schools Grant (DSG). The Schools block is one of the four blocks of funding within the Dedicated Schools Grant.
- 2.2 The Schools' Forum is requested to define the funding setting processes for all schools and academies within the borough for the next financial year. Given national government announcements on future funding for schools, this process will assist schools in preparing strategic plans, ensuring schools are able to create viable budgets, staffing and curriculum plans. All decisions will affect the amount available to be delegated directly with schools and focus on what funding is centrally retained to protect services and schools.



### 3 How does this deliver objectives of the Corporate Plan?

	<p><b>Best start in life for children and young people</b> Delegated grant funding in support of children and schools providing suitable provision within schools in the community and being able to support that readiness and long term promotion of becoming good citizens within the community.</p>
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### 4 Context and Key Issues

- 4.1 This report is to inform Schools Forum members of the funding allocations for the Dedicated Schools Grant (DSG) and the draft school budget information for 2024/25 in accordance with recommendations and decisions voted at the last schools forum meeting (11<sup>th</sup> December 2023). The budget information may change, subject to approval from the Department of Education (DfE) and/or decisions that will be taken at Cabinet on 7<sup>th</sup> February 2024.
- 4.2 Schools Forum members should note that the final funding model will be submitted to the Department for Education to meet the final deadline date of 22<sup>nd</sup> January 2024 and the authority should receive confirmation of the budgets shortly thereafter. At this point, the LA will be in a position to distribute budget to all schools.
- 4.3 This report allows school governing bodies and academy boards to start their financial planning for 2024/25 and to make appropriate structural and educational adjustments to meet the needs of young people within the constraints of their resource allocations.
- 4.4 The Department for Education (DfE) announced the DSG allocations for 2024/25 on 19<sup>th</sup> December 2023 and the table below details 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	349.852	(3.276)	346.576
Central School Services	2.381	0	2.381
High Needs	75.436	(4.490)	70.946
Early Years	38.535	0	38.535
<b>Total</b>	<b>466.204</b>	<b>(7.766)</b>	<b>458.438</b>

- 4.5 It should be noted that the Mainstream Schools Additional Grant - MSAG is included in the NFF for 2024/25. Therefore, this will not be paid as a separate grant to mainstream schools in 2024/25.
- 4.6 The increase in the Early Years Grant is due to the expansion of the Early Years Offer to include 15 hours funding for the working parents of 2 year olds from April 2024 and for children from 9 months old from September 2024. This offer will expand again to 30 hours funding for all children of working parents from September 2025. A consultation will take place on how this expansion will work in the coming months.
- 4.7 A comparison of the funding and the pupils from 2022/23 to 2024/25 is shown below:

<b>DSG Block (After Adjustments)</b>	<b>2022/23</b>	<b>2023/24</b>	<b>2024/25</b>
Schools Block allocation	£305.502m	£323.182m	£346.576m
Pupil Numbers	56,025	56,462	57,014
Central Schools Services Block	£2.249m	£2.306m	2.381m
High Needs Block allocation	£58.137m	£67.737	£70.946m



Pupil Numbers in special school	832	884	967
Early Years Block allocation	£23.387m	£25.823m	£38.535m
3 & 4 Year old Universal PTE	5,524	5,517	TBC
3 & 4 Year old – Additional 15 Hours PTE	1,592	1,667	TBC
2 Year old PTE	1,168	1,331	TBC
Early Years Pupil Premium (This funding is included within the “Early Years Allocation above”)	£0.308m	£0.339m	TBC

4.8 The DfE has agreements with the following agencies to purchase a single national licence managed by the DfE for all state funded schools in England. This is included in the Central Schools Services Block.

- Christian Copyright Licensing International (CCLI)
- Copyright Licensing Agency (CLA)
- Education Recording Agency (ERA)
- Public Video Screening Licence - Filmbank Distributors Ltd. (PVSL)
- Mechanical Copyright Protection Society (MCPS)
- Motion Picture Licensing Company (MPLC)
- Newspaper Licensing Authority (NLA)
- Performing Rights Society (PRS)
- Phonographic Performance Limited (PPL)
- Schools Printed Music Licence (SPML)

4.9 The arrangement covers academies as well as maintained schools and the ESFA deduct the charge from the DSG. We are still awaiting the figure for 2024/25 but the 2023/24 deduction for Sandwell is £0.381m (excluding VAT)

4.10 The 2024/25 Early Years Block allocations are indicative, and based on Schools, Early Years and Alternative Provision censuses data from January 2023. The final allocations for each of these funding streams will be based on five-twelfths of the January 2024 census numbers plus seven-twelfths of the January 2025 census numbers.



- 4.11 The High needs block allocations are provisional figures and will be updated in the new year. The import/export adjustment will be updated in the summer term 2024 to reflect the latest data from the January 2024 schools census and the RO6 of the 2023 to 2024 Individual Learner Record (ILR). The DfE will make further adjustments in April 2024 to the place funding deductions for the academic year 2024 to 2025 to reflect the outcome of the 2024 to 2025 place change notifications process and to reflect further academy conversions.
- 4.12 The Schools Block funding that has been distributed through the main funding formula is £343,810,026. This has been calculated as follows:

<b>Description</b>	<b>2023/24 £m</b>	<b>2024/25 £m</b>
Schools Block DSG	325.898	349.852
Less NNDR	(2.716)	(3.276)
Less Pupil Number Growth Contingency	(1.664)	(1.600)
Less Falling Rolls Fund Contingency	0	(0.654)
Less Transfer from Schools Block to Central Schools Services Block	(0.455)	(0.512)
<b>Schools Block DSG Available to Distribute</b>	<b>321.063</b>	<b>343.810</b>

- 4.13 The school funding model has to be submitted to meet the DfE deadline of 22<sup>nd</sup> January 2024 for review and final confirmation of the budgets.
- 4.14 The table below lists the factor rates for the local authority formula to be applied to school's budgets for 2024/25. Rates may change subject to decisions by the DfE and or the Cabinet meeting.

### **Falling Roll Funds**

- 4.15 As recommended at the last Schools Forum meeting. Two secondary schools qualify for the falling roll fund. Therefore, an amount of £654,000 has been top-sliced from the school's block.



<b>NFF Factor</b>	<b>2023/24 £</b>	<b>2024/25 £</b>
Primary basic entitlement	3,661.82	3,803.04
KS3 basic entitlement	5,184.44	5,381.50
KS4 basic entitlement	5,274.34	5,557.05
Primary FSM	216.20	252.84
Secondary FSM	216.20	252.84
Primary FSM6	319.49	473.77
Secondary FSM6	587.35	802.69
Primary IDACI F	32.11	57.02
Primary IDACI E	106.43	128.94
Primary IDACI D	498.71	497.84
Primary IDACI C	562.12	558.91
Primary IDACI B	611.03	605.93
Primary IDACI A	661.32	672.19
Secondary IDACI F	47.16	81.12
Secondary IDACI E	377.71	389.66
Secondary IDACI D	693.19	695.87
Secondary IDACI C	789.22	788.30
Secondary IDACI B	869.84	865.86
Secondary IDACI A	939.44	953.50
Primary EAL3	579.34	589.41
Secondary EAL3	924.84	1009.66
Primary LPA	1,240.97	1247.37
Secondary LPA	1,810.11	1829.10
Primary mobility	112.88	211.59
Secondary mobility	163.55	303.9
Primary lump sum	135,044.95	140,740.46
Secondary lump sum	135,044.95	140,740.46



## **Split site factor**

- 4.16 The movement to NFF has necessitated that only the NFF split site factor can be used in the APT. Sandwell's local split site factor is significantly higher than the NFF factor. This has resulted in significant reduction in the funding for one school in the formula for 2024/25.

## **Closed/merged School**

- 4.17 An Infant and Junior school are proposing to merge into a primary school from 1<sup>st</sup> April 2024. The nature of the merger is that the Infant school will close, and the Junior school's status will change to a full primary school. The formula has been prepared based on the primary school starting on 1<sup>st</sup> April 2024. Should that not be the case, we will have to re-run the formula to include 2 separate schools. This will have impact on affordability and other factors in the formula.

## **Capping and Scaling (C&S)**

- 4.18 The DfE allows overall gains for individual schools to be capped as well as scaled back to ensure that local formulae are affordable. This methodology was new to Sandwell in 2023/24 as we move closer to the NFF. It was found that our local formula had a small shortfall of £0.5m in 2024/25 and so 2.9% capping and 58.58% scaling has been applied.
- 4.19 The higher the level of capping, the more the number of schools that will gain but the more severe the level of scaling to ensure the Schools Block is affordable.
- 4.20 It is still possible that capping and scaling (C&S) will change after the review by the DfE as stated in 4.2 above. When that happens, and update will be provided to Schools Forum at its next meeting.

## **C&S Background - Reminder**

- 4.21 Local authorities can cap any gains schools receive through the 2024 to 2025 local formula and will be applied on the same basis to all schools.
- 4.22 The DfE applies caps and scales to academy budgets on the same basis as for maintained schools, although the values may differ from those shown in the APT since the actual baseline position for the academy may not be the same as that shown in the APT dataset.



4.23 C&S factors must not be applied to schools that have opened in the last 7 years and have not reached their full number of year groups. This definition of new and growing schools does not include existing schools that are extending to include a new phase and have empty year groups in the new phase.

4.24 C&S cannot take a school below the Minimum Per Pupil Levels (MPPLs). Should local authorities elect to apply a gains cap in 2024/25, the cap must be set at least as high as the MFG threshold. This ensures all schools retain any gains up to the MFG threshold even where a cap is applied.

## 5 Implications

<b>Resources:</b>	As at 2023/24 the Sandwell's Schools Formula was substantially different to the National Funding Formula (NFF). By 2027/28 all schools will be funded in the same way and so there will be a period of change on the way resources are allocated to school as we move closer to the NFF.
<b>Legal and Governance:</b>	The School and Early Years Finance Regulations 2023 set out the funding arrangements for the 2024 to 2025 funding period. These regulations make provision for the financial arrangements of local authorities in relation to the funding of maintained schools and providers of prescribed Early Years provision in England. The schools' forums (England) regulations 2012 govern the constitution and conduct of meetings of the Schools Forum and determine those matters on which the local authority must or may consult the schools' forum and those in respect of which the schools' forum can make decisions.
<b>Risk:</b>	There is a risk that as we have to move closer to the NFF that schools may see a reduction in their funding. Schools and their Governing Bodies are responsible for setting an annual balanced budget, however they have another 3 years to incorporate these changes into their strategic plans.
<b>Equality:</b>	There are no Equality Implications
<b>Health and Wellbeing:</b>	There are no Health and Wellbeing Implications





<b>Social Value:</b>	There are no Social Value Implications
<b>Climate Change:</b>	There are no climate change implications
<b>Corporate Parenting:</b>	There are no Implications for Corporate Parenting responsibilities

## 6 Appendices

Appendix 1 – All schools - Draft Funding Allocations (New ISB tab from APT Model)

## 7. Background Papers

The Consultation Document was circulated at the previous meeting and communicated to schools on circular 124.



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## Report to School Forum

15 January 2024

<b>Subject:</b>	Schools Closedown Timetable 2023/24
<b>Director:</b>	Director of Children and Education Michael Jarrett
<b>Contact Officer:</b>	Elaine Taylor (elaine_taylor@sandwell.gov.uk)


### 1 Recommendations

- 1.1 The Schools' Forum note the Schools Closedown Timetable 2023/24.

### 2 Reasons for Recommendations

- 2.1 To advise members of the closedown deadlines for maintained schools for the 2023/24 annual accounts.

### 3 How does this deliver objectives of the Corporate Plan?

	<p><b>Best start in life for children and young people</b> To deliver information and data from year end activities to inform future strategic decisions within the Education Sector.</p>
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### 4. Audited Accounts

- 4.1 The Government deadline for local authorities to publish their audited accounts is July 2024. It is, therefore, critical for all stakeholders to work together towards this deadline.
- 4.2 Whilst it is acknowledged that the schools Budget/Finance Officer may complete some of the tasks on schools' behalf, it is the responsibility of the Head Teacher to ensure all tasks are completed and that deadlines for submissions are adhered to. This may involve opening the school during the Easter break if there is no remote access.



4.3 A summary of the critical deadlines is set out below. Unless stated otherwise all deadlines are 1pm on the dates stated.

- 9<sup>th</sup> February 2024 - Leasing returns
- 8<sup>th</sup> March 2024 – Interim Capital Return
- 3<sup>rd</sup> April 2024 – Copy of Bank Statement - showing clearly the bank balance at the end of the day 31<sup>st</sup> March 2024. If schools do not have electronic access, please liaise with your banks to ensure this deadline is met. We cannot process your Excel Closedown Template until we have this.
- 15<sup>th</sup> April 2024 – Year End Excel Closedown Template (Final Capital Return should balance to interim).

4.4 In order to comply with external audit and achieve the closedown deadlines set by the authority, the Children’s Finance Team (CFT) will need to have the Excel Closedown Templates as and when they are completed. This will allow sufficient time for returns to be checked, queries resolved and information to be uploaded and reconciled to the Authority’s General Ledger.

4.5 A detailed position of Schools’ financial positions will be available when the provisional outturn report is prepared sometime in Summer 2024.

## 7. Implications

<b>Resources:</b>	As presented in this document.
<b>Legal and Governance:</b>	The schools’ forums (England) regulations 2012 govern the constitution and conduct of meetings of the forum. The schools finance (England) regulations 2012 determine those matters on which the local authority must or may consult the schools’ forum and those in respect of which the schools’ forum can make decisions. These regulations make provision for the financial arrangements of local authorities in relation to the funding of maintained schools and providers of prescribed Early Years provision in England.
<b>Risk:</b>	None
<b>Equality:</b>	None



<b>Health and Wellbeing:</b>	None
<b>Social Value:</b>	None
<b>Climate Change:</b>	None
<b>Corporate Parenting:</b>	None

**8. Appendices**

None

**9. Background Papers**

None.



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