

Agenda Schools Forum

**Monday 18 March 2024 at 2.30 pm
in the Council Chamber - Sandwell Council House, Oldbury**

- | | | |
|----------|---|---------|
| 1 | Apologies for Absence | 11 - 12 |
| | To receive any apologies for absence. | |
| 2 | Declarations of Interest | 13 - 14 |
| | Members to declare any interests in matters to be discussed at the meeting. | |
| 3 | Minutes | 15 - 58 |
| | To confirm the minutes of the meetings held on 6 November and 11 December 2023 and 15 January and 26 February 2024 as a correct record. | |
| 4 | Schools Budget Information 2024/25 | 59 - 64 |
| | To consider the Schools Budget 2024/25. | |
| 5 | Schools DSG Growth Funding 2023/24 | 65 - 68 |
| | To consider the Schools DSG Growth Funding 2023/24. | |



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

Schools Forum Distribution to Members:

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

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

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

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

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

| Academies Block | Voting |
|---------------------------------|---|
| 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...

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

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

NON-SCHOOL MEMBERS

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

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

| 16-19 Provider | Voting |
|-----------------------|--|
| 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 Arnall, 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.

Forum members requested information on the Special School Additional Grant and Teachers Pay Additional Grant.

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 | | MODELLING OPTION 2 | | MODELLING OPTION 3 | |
|---------------------------------|---------------------------|----------------------------|---------------------------|----------------------------|-----------------------------|----------------------------|------------------------------------|------------------|--------------------|------------------|--------------------|------------------|--------------------|------------------|
| | 1 | 2 | 1 | 2 | 3 | 4 | 5 | 6 | 1 - (4 X 90%) | 1 - (4 X 80%) | 1 - (4 X 80%) | 1 - (4 X 80%) | 1 - (4 X 80%) | 1 - (4 X 80%) |
| EXAMPLE | £1,050.00 | £1,000.00 | £1,000.00 | £1,000.00 | £600.00 | £600.00 | £400.00 | £400.00 | £690.00 | £730.00 | £730.00 | £1,050.00 | £1,050.00 | £1,050.00 |
| Primary (Years R-6) | £3,562.00 | £3,394.00 | £3,394.00 | £3,394.00 | £3,661.82 | £3,661.82 | (£267.82) | (£267.82) | £3,803.04 | £3,776.26 | £3,776.26 | £3,562.00 | £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 | £5,341.55 | £5,341.55 | £5,022.00 | £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 | £5,556.07 | £5,556.07 | £5,661.00 | £5,661.00 | £5,661.00 |
| Additional Needs Funding | Primary amount pp | Secondary amount pp | Primary amount pp | Secondary amount pp | Primary amount pp | Secondary amount pp | Primary | Secondary | Primary | Secondary | Primary | Secondary | Primary | Secondary |
| 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 | £387.35 | £385.51 | £442.65 | £473.77 | £802.69 | £511.59 | £845.88 | £820.00 | £1,200.00 |
| IDAC1 Band F | £235.00 | £340.00 | £330.00 | £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 | £924.84 | £0.66 | £640.16 | £589.41 | £1,009.86 | £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 | £1,340.97 | £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 | £1,122.88 | £1,623.55 | £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 |

NB: rounded to meet minimum values shown on the APT Factor Value Limits worksheet

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).

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

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:

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

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.

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



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



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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 also requested that the Council provide information on the Special School Additional Grant and Teachers Pay Additional Grant. 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.

57/23

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.
- Forum members stated that the Council should ensure that an application was submitted on time and that the application window was not missed.
- 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.

57/23

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 recoupmnt of £4.190m by the Department of Education (DfE) for academies, free schools and post-16 commissioned places, there was a net sum of £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 school in financial difficulty, 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.



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



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2024-25 Schools Funding Consultation

| Question | Forum Decision |
|---|-----------------|
| <p>1. Please indicate the option you prefer to use for calculating schools funding for 2024/25?</p> <p>OPTION 1 - Minimum Transition (11 votes) OPTION 2 - Accelerated Transition (1 vote) OPTION 3 - National Funding Formula Factor (6 votes)</p> | <p>OPTION 1</p> |
| <p>2. Do you agree to the use of the Brought Forward of £0.282m to set the Pupil Number Growth Fund?</p> <p>Yes (19 votes) No (none) Abstention (1)</p> | <p>YES</p> |
| <p>3. Do you agree to the introduction of a Falling Rolls Fund (FRF)?</p> <p>Yes (9 votes) No (8) Abstention (2)</p> | <p>YES</p> |
| <p>4. Do you agree to the top slice of £512,000 from the Schools Block to the Central Schools Services Block (CSSB) to fund the Attendance Team?</p> <p>Yes (19 votes) No (none) Abstention (1)</p> | <p>YES</p> |
| <p>5. Do you agree with the indicative allocation of the CSSB?</p> <p>Yes (19 votes) No (none) Abstention (1)</p> | <p>YES</p> |

| | | |
|----|--|---|
| 6. | <p>Do you agree with the (following) De-delegated Proposals?</p> <p>DD1 Health & Safety Licences DD2 EVOLVE DD3 Union Facilities Time DD4 School Improvement DD5 Schools in Financial Difficulty</p> | <p>(Maintained sector only)</p> <p>YES YES YES YES NO</p> |
| 7. | <p>Do you agree with the (following) Education Functions Proposals?</p> <p>EF1 Education Benefits Team EF2 Children's Clothing Support Allowance</p> | <p>(Maintained sector only)</p> <p>YES YES</p> |

Responses

The table below compares responses from the previous 4 years:

| | Primary | % | Secondary | % | TOTAL | % |
|----------------|---------|-----|-----------|-----|--------|-----|
| 2020-21 | 56/94 | 60% | 9/18 | 50% | 65/112 | 58% |
| 2021-22 | 60/95 | 63% | 10/20 | 50% | 70/115 | 61% |
| 2022-23 | 43/94 | 46% | 10/20 | 50% | 53/114 | 47% |
| 2023-24 | 55/94 | 59% | 6/20 | 30% | 61/114 | 54% |
| 2024-25 | 55/94 | 59% | 10/20 | 50% | 65/115 | 57% |

Question 1

Please indicate the option you prefer to use for calculating schools funding for 2024/25? There were 3 possible responses which were:

- OPTION 1 - Minimum transition
- OPTION 2 - Accelerated transition
- OPTION 3 – National Funding Factor (NFF) values

| Q1: Overall Responses | Total | % |
|--|-----------|-------------|
| OPTION 1 - Minimum Transition | 51 | 78% |
| OPTION 2 - Accelerated Transition | 5 | 8% |
| OPTION 3 - National Funding Formula Factor | 9 | 14% |
| Grand Total | 65 | 100% |



| Q1: Detailed Responses | Total |
|---|-----------|
| Minimum Transition | 51 |
| Primary | 47 |
| Secondary | 4 |
| Accelerated Transition | 5 |
| Primary | 4 |
| Secondary | 1 |
| National Funding Formula Factor Values | 9 |
| Primary | 4 |
| Secondary | 5 |
| Grand Total | 65 |

Question 2

Do you agree to the use of the Brought Forward of £0.282m to set the Pupil Number Growth Fund? There were 2 possible responses which were:

- YES
- NO

| Q2: Overall Responses | Total | % |
|-------------------------------------|-----------|-------------|
| YES – Utilise the Brought Forward | 56 | 86% |
| NO – Do NOT use the Brought Forward | 9 | 14% |
| Grand Total | 65 | 100% |



| Q2: Detailed Responses | Total |
|--------------------------------|-----------|
| YES - Utilise the B/F | 56 |
| Primary | 47 |
| Secondary | 9 |
| NO – Do not utilise B/F | 9 |
| Primary | 8 |
| Secondary | 1 |
| Grand Total | 65 |

Question 3

Do you agree to the introduction of a Falling Rolls Fund (FRF)? There were 2 possible responses which were:

- YES
- NO

| Q3: Overall Responses | Total | % |
|---|-----------|-------------|
| YES – Agree with the introduction of a FRF | 44 | 68% |
| NO – Do NOT agreed with the introduction of a FRF | 21 | 32% |
| Grand Total | 65 | 100% |

| Q3: Detailed Responses | Total |
|-------------------------------------|-----------|
| YES – introduce a FRF | 44 |
| Primary | 38 |
| Secondary | 6 |
| NO – Do NOT agree with a FRF | 22 |
| Primary | 18 |
| Secondary | 4 |
| Grand Total | 65 |



Question 4

Do you agree to the top slice of £512,000 from the Schools Block to the Central Schools Services Block (CSSB) to fund the Attendance Team? There were 2 possible responses which were:

- YES
- NO

| Q4: Overall Responses | Total | % |
|--------------------------------------|-----------|-------------|
| YES – agree to £512k top slice | 57 | 88% |
| NO – Do NOT agree to £512k top slice | 8 | 12% |
| Grand Total | 65 | 100% |

| Q4: Detailed Responses | Total |
|---|-----------|
| YES – agree to £512k top slice | 57 |
| Primary | 47 |
| Secondary | 10 |
| NO – do NOT agree to £512k top slice | 7 |
| Primary | 7 |
| Secondary | 0 |
| Grand Total | 65 |

Question 5

Do you agree with the indicative allocation of the CSSB?

| Q5: Responses | YES | NO |
|---|-----|----|
| CSSB1 – Statutory & Regulatory /Welfare and Asset Man | 57 | 8 |
| CSSB2 Admissions Service | 57 | 8 |
| CSSB3 Historical Commitment Pensions Administration | 57 | 8 |
| CSSB4 Schools Forum | 57 | 8 |



Question 6 and 7

Please indicate YES / NO if you agree with the De-delegated and Education Functions Proposals? There were 2 possible responses which were either Yes or No to each of the proposals.

De-Delegation

| Q6: Responses | YES | NO |
|-------------------------------------|-----|----|
| DD1 Health & Safety Licences | 43 | 8 |
| DD2 EVOLVE | 50 | 1 |
| DD3 Union Facilities Time | 33 | 18 |
| DD4 School Improvement | 44 | 7 |
| DD5 Schools in Financial Difficulty | 31 | 20 |

Education Functions proposals

| Q7: Responses | YES | NO |
|---|-----|----|
| EF1 Education Benefits Team | 45 | 6 |
| EF2 Children's Clothing Support Allowance | 32 | 19 |



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Minutes of Schools Forum

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

Present:

Maintained Primary

S Baker, A Gilbert and W Lawrence.

Maintained Secondary

C Handy-Rivett.

Maintained Special Schools

O Flowers.

Pupil Referral Unit

K Hazelwood

Governors

E Benbow and D Steen.

Academy Primaries

L Bray, J Farmer and R Reed.

Academy Secondaries

M Arnull, G Faux, K Featherstone, and J Topham.

Special Academy

N Toplass (Chair).

Early Years Partnership

C Spooner.

16-19 Provider

C Hadley.



Officers: Julie Andrews (Assistant Director - Education Services); Abi Asimolowo (Head of Financial Business Partnering-People); Elaine Taylor (Finance Business Partner) and; Connor Robinson (Democratic Services Officer).

1/24 **Apologies for Absence**

Apologies for absence were received from J Barry (Vice-Chair), L Mason and A Connop (Substitute)

2/24 **Declarations of Interest**

No declarations of interest were made.

3/24 **Minutes**

Forum members raised the previous request relating to information on the Special School Additional Grant and Teachers Pay Additional Grant. Forum members were advised that the direction of travel was similar to previous years and that the decisions around Special School Additional Grant and Teachers Pay Additional Grant were made outside of Forum.

In response to questions relating to Union Facilities time Forum was presented with the weighting breakdown for unions to claim.

The current facilities time formula was based on Sandwell Trade Union membership on schools buying into the local authority.

| Sandwell Trade Union membership on schools buying into LA Facility Time | Allocation from duties in days |
|--|---------------------------------------|
| 0 - 50 | 0.5 |
| 51 - 100 | 1 |
| 101 - 300 | 2 |
| 301 - 500 | 3 |



| | |
|----------------|---|
| 501 - 800 | 4 |
| 801 - 1500 | 5 |
| 1501 - 2500 | 6 |
| 2501 and above | 7 |

The distribution of funding for Facilities time was noted as:

| | |
|--------|-------------------|
| ASCL | 0.5 day per week |
| ATL | 1 day per week |
| GMB | 5 days per week |
| NAHT | 1 day per week |
| NASUWT | 4 days per week |
| NEU | 6.5 days per week |
| UNISON | 5 days per week |
| UNITE | 0.5 day per week |

The balance of the facilities time pot was not available and would be communicated to Forum members at a later date.

Further to Minute No. 58/23 it was reported that the school in question had received the additional funds which would make a positive impact this financial year. It was anticipated that a sustainable plan would be established to ensure the school avoided the position of having to repletely catch up on its finances.

Members noted that a High Needs Block monitoring report was not on the agenda. Forum was advised that the staff member responsible for the report had returned to the Council and reports would be provided to subsequent meetings.

Forum members raised the continued increase in those pupils with SEND and the financial impact that was incurring across schools. Members advised that it was necessary for the continued monitoring of the High Needs Block to ensure its sustainability.

Additional concerns were raised about the accuracy of the previous minutes from meetings held on 6 November and 11 December 2023. Forum agreed to defer the minutes of both meetings to ensure they accurately represented the discussions at those meeting.



Resolved that the minutes of the meetings held on 6 November and 11 December 2023 be deferred to the next meeting.

4/24

Dedicated Schools Grant Allocations and Draft Budgets 2024/25

Schools Forum considered the Dedicated Schools Grant Allocations and Draft Budgets 2024/25.

Forum considered the report that informed members of the draft funding allocations for the DSG and the draft school budget information for 2024/25 in accordance with recommendations and decisions voted at the last schools forum meeting (Minute No. 56/23 - 11 December 2023). Forum was advised that the budget information may change, subject to approval from the Department of Education (DfE) and/or decisions that would be taken at Cabinet on 7 February and subsequently Council 20 February 2024.

Forum members were asked to note that the final funding model which would be submitted to the DfE to meet the final deadline date of 22 January 2024 and whereby the authority should receive confirmation of the budgets shortly thereafter. The deadline for disseminating 2024/25 funding to Schools was 28 February 2024.

The information within the report was to allow 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.

The DfE announced the DSG allocations by block for 2024/25 on 19 December 2023:



| DSG Block | Allocation prior to Adjustments | Adjustments | Allocation after adjustments |
|-------------------------|--|--------------------|-------------------------------------|
| | £m | £m | £m |
| 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 |
| Total | 466.204 | (7.766) | 458.438 |

Forum noted that the Mainstream Schools Additional Grant (MSAG) was included in the National Funding Formula (NFF) for 2024/25. Therefore, this would not be paid as a separate grant to mainstream schools in 2024/25.

The increase in the Early Years Grant was 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 would be further expanded to 30 hours funding for all children of working parents from September 2025. A consultation would take place on how this expansion would work later in the year.

A comparison of the funding and the pupils from 2022/23 to 2024/25 was detailed as:



| DSG Block (After Adjustments) | 2022/23 | 2023/24 | 2024/25 |
|--|----------------|----------------|----------------|
| 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 |

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

The High Needs Block allocations were provisional figures and would be updated in the new financial year. The import/export adjustment would 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 would 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.



The Schools Block funding that had been distributed through the main funding formula was £343,810,026. This had been calculated as follows:

| Description | 2023/24 | 2024/25 |
|--|----------------|----------------|
| | £m | £m |
| 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) |
| Schools Block DSG Available to Distribute | 321.063 | 343.810 |

The school funding model had to be submitted to meet the DfE deadline of 22 January 2024 for review and final confirmation of the budgets.

Two secondary schools qualified for the recently established falling roll fund. Therefore, an amount of £654,000 had been top-sliced from the school's block.

The rates for the local authority formula to be applied to school's budgets for 2024/25:



| NFF Factor | 2023/24 £ | 2024/25 £ |
|---------------------------|----------------------|----------------------|
| 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 |



A number of variations were noted across the rates by Forum.

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

An Infant and Junior school were proposing to merge into a primary school from 1 January 2024. The nature of the merger was that the Infant school would close, and the Junior school's status would change to a full primary school. The formula had been prepared based on the primary school starting on 1 January 2024. Should that not be the case, there would need to be a re-run of the formula which would have an impact on the affordability and other factors in the formula.

The DfE allowed overall gains for individual schools to be capped as well as scaled back to ensure that local formulae were affordable. This methodology was new to Sandwell in 2023/24 as the Council move closer to the NFF. It was found that the Councils local formula had a small shortfall of £0.5m in 2024/25 and so 2.9% capping and 58.58% scaling had been applied.

The higher the level of capping, the more the number of schools that would gain but the more severe the level of scaling to ensure the Schools Block was affordable.

Forum was reminded that local authorities can cap any gains schools receive through the 2024 to 2025 local formula and this would be applied on the same basis to all schools. The DfE applied caps and scales to academy budgets on the same basis as for maintained schools.

Capping and scaling factors were not applied to schools that had opened in the last 7 years and had not reached their full number of year groups. This definition of new and growing schools did not include existing schools that are extending to include a new phase and have empty year groups in the new phase.



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

- the Mainstream Schools Additional Grant was now included within the NFF and was not a separate grant;
- within the DSG the High Needs Block was noted as £70.946m for 2024/25;
- no school had previously qualified for access to Falling Roll Fund, this had now increased to two schools and the amount had been agreed in principal;
- the DfE had mandated that split sites move to the NFF;
- it was noted that the NFF would include 2.9% capping and 58.58% scaling, any school falling below the cap would not be affected;
- there were questions relating to the capping and scaling having a more positive effect for primary schools, however officers stated that the effect would be more random;
- the move to the NFF was likely to favour secondary schools;
- any update to the capping and scaling would be shared at the next meeting.

Resolved that Schools Forum note the Dedicated Schools Grant Allocations and Draft Budgets 2024/25 and are content for the data to be submitted to the DfE.

5/24

Schools Closedown Timetable 2023/24

Forum considered the Schools Closedown Timetable 2023/24. The Government had a deadline for local authorities to publish their audited accounts in July 2024. It was, therefore critical for all stakeholders to work together towards this deadline.

The critical deadlines were noted as 1pm on:

- 9 February 2024 - Leasing returns
- 15 March 2024 – Interim Capital Return
- 3 April 2024 – Copy of Bank Statement
- 17 April 2024 – Year End Excel Closedown Template

In order to comply with external audit and achieve the closedown deadlines set by the authority, the Children's Finance Team would



need to have the Excel Closedown Templates as and when they are completed. This would allow sufficient time for returns to be checked, queries resolved and information to be uploaded and reconciled to the Authority's General Ledger.

A detailed position of Schools' financial outturn would be available at the July 2024 meeting.

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

- if schools were able to stagger their submissions it would not create a backlog for finance staff who are unable to process every school on the same day;
- early publication of the closedown timetable should give schools without internet banking time to resolve this so that 31 March bank statements could be accessed and forwarded in a timely manner.

Resolved that a revised closedown timetable 2023/24 be distributed to schools by the end of January 2024.

6/24 **Future Meeting Dates**

The Forum noted the future meeting dates:-

- 18 March 2024
- 1 July 2024

7/24 **AOB**

Funding for safeguarding for schools to be sourced from the DSG was raised. Forum was advised that the funding of the safeguarding arrangements was statutory, and the current funding model had run its course, funds were now required to be directed towards the arrangements. All safeguarding partners were required to fund the arrangements and it was hoped that a proportion of the DSG would be available to fund the local authorities contribution.



It was proposed that the Forum reinstate the SEND Working Group, following review and streamlining of the workstreams, the Council was of the opinion that it would be more appropriate for the SEND Working Group to pick up this piece of work as an already established group.

Resolved that:-

- (1) A report detailing the safeguarding arrangements and the exploration of a DSG contribution b presented to the 18 March meeting.
- (2) The SEND Working Group be established to review SEND banding and top-ups and the financial implications. The Working Group would include O Flowers (Chair), J Barry, M Arnull, C Hadley, C Handy-Rivett, K Hazlewood, W Lawrence and N Toplass)

Meeting ended at 3.49pm

Contact: democratic_services@sandwell.gov.uk



Minutes of Schools Forum

**Monday 26 February at 2.00pm
Online Virtual Meeting via MS Teams**

Present: **Maintained Primary**
S Baker, J Barry A Gilbert, S Mistry and W Lawrence.

Maintained Secondary
C Handy-Rivett.

Maintained Special Schools
O Flowers.

Governors
E Benbow.

Academy Primaries
L Bray, J Farmer and R Reed.

Academy Secondaries
M Annull, G Faux, L Moore, and J Topham.

Special Academy
N Toplass (Chair).

Officers: Julie Andrews (Assistant Director - Education Services);
Abi Asimolowo (Head of Financial Business Partnering);
Elaine Taylor (Finance Business Partner);
Prakash Patel (Senior Accountant);
Sara Baber (Early Years Lead);
Connor Robinson (Democratic Services Officer); and
John Swann (Democratic Services Officer).



8/24 **Apologies for Absence**

Apologies for absence were received from K Featherstone, C Hadley, L Mason and D Steen.

9/24 **Declarations of Interest**

No declarations of interest were made.

10/24 **Early Years Provider Rates 2024/25 Consultation**

Forum considered the Early Years Provider Rates 2024/25 Consultation.

On 27 October 2021, the Chancellor announced the Government would invest additional funding for the early years' entitlements for two, three and four-year olds worth £160m in 2022 2023, £180m in 2023-2024 and £170m in 2024-2025. This would allow local authorities to increase hourly rates paid to early years providers for the Government's free childcare entitlement offers and reflected cost pressures, as well as anticipated changes in the number of eligible children. On 29 November 2023 the Department of Education (DfE) published the indicative funding rates for Local Authorities.

Local authorities were required to consult providers on annual changes to their local formula. Any changes to funding need to be approved by Schools Forum.

The early years national funding formula hourly rates had been increased by £0.77 per hour for two year olds and £0.27 (4.9%) per hour for three and four year olds.

There was an increase in the Early Years Pupil Premium funding from 66p per hour to 68p for all eligible children. The age range of eligibility had also increased to include disadvantaged 2 year olds. This would create a distinction between the newly funded working parents of 2 year olds, who would receive £8.48 per hour, and our



targeted 40% most disadvantaged 2 year olds, who would receive £9.16 if they meet the eligibility criteria.

On 29 January 2024 the Quality Early Years and Child Care Team started a consultation via email to 87 Day Care Providers and 92 Child Minders as they were providers who deliver the Two Year Old funding and the Nursery Education Funding in Sandwell's Private Voluntary and Independent childcare sector. The consultation had also been sent to all Primary and Infant Schools. The consultation ended on 9 February 2024.

The consultation centred around the question of whether there was agreement in the local authority's proposal that full funding increase should be added to the base rate of hourly funding for all 2 year olds and 3 and 4 year olds and that the flexibility rate (30p) and deprivation payment (maximum 25P), as defined by our Single Funding Formula (SFF), should remain the same.

It was deemed that all schools and providers would benefit from an uplift in the base rate of funding and keep the flexibility and deprivation payments at the same rate as paid previously.

The response to the question 'With the introduction of the Extended Entitlements for working parents of 2 year olds from April 2024 the basic rate of funding for 2 year olds will increase from £7.71 to £8.48. Do you agree that the additional funding should be added to the base rate for all 2 year olds? Was:

100% of responses agreed with this proposal.

The response to the question 'Do you agree that Sandwell MBC should increase the basic rate of funding for 3 and 4 Year olds by the full increase given by the DFE of 27p per hour per child? This will be a 4.9% increase in the basic rate of funding from £4.79 per hour to £5.06 per hour' was:

99% of responses agreed with this proposal.

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



- the formula would ensure that the 95% pass through rates as a minimum was achieved;
- every local authority was allocated different funding levels and rates from the DfE, Sandwell had higher rates than the other Black Country local authorities;
- any increase in rates was passed on to providers, the Council did not hold back any incrementing rates.

Resolved that Schools Forum:

- (1) Approve the increase of the Two-Year-old hourly rate from £7.71 to £8.48;
- (2) Approve the increase of the Three and Four-year-old hourly rate from £4.79 to £5.06.

Meeting ended at 2.20pm

Contact: democratic_services@sandwell.gov.uk



Report to School Forum

18 March 2024

| | |
|-------------------------|--|
| Subject: | Schools Budget Information 2024/25 |
| Director: | Interim Director of Children and Education Sally Giles |
| Contact Officer: | Elaine Taylor - Finance Business Partner elaine_taylor@sandwell.gov.uk |


1 Recommendations

1.1 The Schools' Forum note the contents of the report.

2 Reasons for Recommendations

2.1 To advise members of the allocation of schools funding in the 2024/25 financial year.

3 How does this deliver objectives of the Corporate Plan?

| | |
|---|---|
|  | <p>Best start in life for children and young people To deliver budgetary and financial information and data for the forthcoming year to inform future strategic decisions within the Schools Sector.</p> |
|---|---|

4. Report Details

4.1 The 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.

4.2 The Schools Block funding which has been distributed through the main funding formula is set out below:



| Description | £ |
|--|----------------|
| Schools Block DSG | 349.852 |
| Less NNDR | (3.276) |
| Less Pupil Number Growth Contingency | (1.600) |
| Less Falling Rolls Fund | (0.654) |
| Less Transfer from Schools Block to Central Schools Services Block | (0.512) |
| Schools Block DSG Available to Distribute | 343.810 |

4.3 The APT model submitted to Schools Forum for approval in January was cleansed/ revised by the DFE as follows:

- The pupil number fraction for the 2 brand new secondary schools within Sandwell required updating. This resulted in a shortfall within the APT funding model of £1.8m.
- The PFI calculations within the APT funding model had to meet the DFE minimum 10.4% uplift requirement (originally 7%). This was not known at the time and resulted in a further shortfall of £0.05m.

4.4 The above updates resulted in a revision to the capping and scaling percentages as follows:

| | Capping | Scaling |
|---------------------------|---------|---------|
| APT January Schools Forum | 2.9% | 58.58% |
| APT Final DFE Approved | 1.18% | 40.07% |

As a reminder, this means gains up to 1.18% were kept by schools, and any gains above 1.18% were scaled back by 40.07%

4.5 A full worked example for Capping & Scaling/MFG for each school has once again been included within the Schools Budget Tables (Table I) which were published on 27th February 2024 to demonstrate exactly how this was calculated.



4.6 Attached as Appendix 1 is a full breakdown of the 2024/25 Budget tables for each school.

5. Implications

| | |
|------------------------------|---|
| Resources: | As presented in this document. |
| Legal and Governance: | 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 all schools and providers of prescribed Early Years provision in England. |
| Risk: | None |
| Equality: | None |
| Health and Wellbeing: | None |
| Social Value: | None |
| Climate Change: | None |
| Corporate Parenting: | None |

6. Appendices

2024/25 Budget tables for each school.

7. Background Papers

None.



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By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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Report to School Forum

18 March 2024

| | |
|-------------------------|---|
| Subject: | Schools DSG Growth Funding 2023/24 |
| Director: | Interim Director of Children and Education Sally Giles |
| Contact Officer: | Elaine Taylor - Finance Business Partner elaine_taylor@sandwell.gov.uk |


1 Recommendations

1.1 The Schools' Forum note the contents of the report.

2 Reasons for Recommendations

2.1 To advise members of the allocation of growth funding in the 2023/24 financial year and to note the small underspend.

3 How does this deliver objectives of the Corporate Plan?

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



4. Report Details

4.1 The updated budget position for Pupil Number Growth Funding for 2023/24 and revised budget for 2024/25 is set out below:

| | |
|----------------------------------|------------------|
| B/F 2022/23 | 281,826 |
| 2023/24 Budget | 1,671,000 |
| | 1,952,826 |
| | |
| Paid Primary (see table below) | 91,546 |
| Paid Secondary (see table below) | 1,857,114 |
| | 1,948,659 |
| | |
| 2023/24 underspent | 4,167 |
| | |
| 2024/25 Budget | 1,600,000 |
| | |
| 2024/25 Revised Budget | 1,604,167 |

4.2 The payments made per the table above are detailed as follows:

| School | Amount Paid 2023/24 |
|--------------------------------|------------------------|
| | |
| Lightwoods Primary | 45,773 |
| St Matthew's C.E. Primary | 45,773 |
| | |
| TOTAL PRIMARY | 91,546 |
| | |
| Bristnall Hall Academy | 155,533 |
| George Salter Academy | 419,050 |
| Q3 Academy Langley | 321,421 |
| Shireland Collegiate | 278,491 |
| Shireland BioMedical | 622,133 |
| Wodensborough Ormiston Academy | 60,485 |
| | |
| TOTAL SECONDARY | 1,857,114 |
| | |
| TOTAL | 1,948,659 |



4.3 There are no decisions to be made on additional needs growth funding as the underspend does not necessitate this.

5. Implications

| | |
|------------------------------|---|
| Resources: | As presented in this document. |
| Legal and Governance: | 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 all schools and providers of prescribed Early Years provision in England. |
| Risk: | None |
| Equality: | None |
| Health and Wellbeing: | None |
| Social Value: | None |
| Climate Change: | None |
| Corporate Parenting: | None |

6. Appendices

None

7. Background Papers

None.



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Schools Forum

18 March 2024

Special Educational Needs High Needs Block 2024/25 Budget

This report is for Information

1. Recommendations:

That Schools Forum members:

- 1.1 Note the contents of the report in relation to the 2024/25 HNB Grant Budget.

2. Purpose

- 2.1 To provide schools forum with the HNB 2024/25 Budget Information.

3. HNB Budget 2024/25

- 3.1 The HNB Grant for 2024/25 notified by the DFE in December 2023 is £75.436M. After deductions of £4.49M the grant available for distribution equates to £70,946M
- 3.2 Table 1 shows the deductions of £4.49M which are made at source to the HNB and paid directly to the various educational establishments.
- 3.3 The deductions are revised during the year and notified to the LA if applicable. A further deduction is anticipated for the £216K for the Black Country Training Group for which Sandwell is the lead authority for commissioning places. This was not included in the place change notification and a provision has been made in the 2024/25 grant pending a response from the DFE.
- 3.4 Teachers Pay and Teachers Pensions Grant and the Special Schools Grant are included in the budgets.
- 3.5 In previous years the total budget calculated for the year was less than the HNB Grant which meant that there was a small favourable surplus very early on in the financial year. However, for 2024/25 the budgeted costs equate to the grant so it is a breakeven point

and any overspends will impact quickly and it will be necessary to utilise the HNB balances accumulated over the previous 2 years should a deficit be reported during the year.

Table 1 – 2024/25 Deductions

| | £000 |
|--|--------------|
| Pre 16 Focus Provision Academy place deductions | 440 |
| Special school Academy and Free school Place deductions | 2,640 |
| Post 16 SEN mainstream maintained and academy deductions | 90 |
| Post 16 Further Education College Deductions | 1,320 |
| Total Deductions 2023/24 | 4,490 |

4. HNB 2024/25 Budget Allocations

4.1 Table 2 shows the analysis of the 2024/25 HNB Allocation

Table 2 - HNB 2024/25 Budget Allocations

| Budget Heading | Budget 2024/25 £000 | % |
|---|------------------------------------|----------|
| 1) Independent Schools | 12,288 | 17.32% |
| 2) Other LA Maintained and Academy Mainstream and Special Schools pupil support | 1,823 | 2.57% |
| 3) Support for pupils awaiting Placement (NTAS, KRUNCH, Targeted Support Etc) | 360 | 0.51% |

| | | |
|--|---------------|----------------|
| 4) Top up and Place funding delegated to Maintained & Academy Special & Mainstream Schools, Free School and PRUS | 48,377 | 68.19% |
| 5) Support Services for Inclusion and SEN | 6,597 | 9.3% |
| 6) SEN Developments | 684 | 0.96% |
| 7) Other SEN & IS Costs | 817 | 1.15% |
| Total HNB Grant 2023/24 | 70,946 | 100.00% |

4.2 A more detailed breakdown can be found in Appendix 1

4.3 Appendix 2 shows a more detailed breakdown of item 6 & 7 in Table 2 above.

5. Budgeted Specialist places

5.1 The HNB has budgeted for 1394 WTE Specialist Places in Sandwell Provisions across Special Schools, Mainstream Focus Provisions and PRUs.

5.2 Table 3 Shows the places commissioned for the financial year 2024/25. These are whole time equivalents (WTE) where places are commissioned from 1 September 2024.

Table 3 Commissioned Specialist Places & PRU Places

| SPECIAL SCHOOLS | WTE Places |
|----------------------------|-------------------|
| The Orchard | 147 |
| The Meadows | 215 |
| The Westminster School | 252 |
| Shenstone Lodge and Brades | 120 |
| High Point | 90 |

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| | | |
|--|--|------------|
| Elm Tree (WTE 1/4/24-31/3/25) Actual Commissioned places as at 1/9/24 is 90) | | 76 |
| Westminster SPI | | 20 |
| Additional places budgeted for in year across all Special Schools for potential over occupancy from 1/9/24 WTE | | 12 |
| TOTAL | | 932 |

| | | |
|--|------|------------|
| FOCUS PROVISIONS & SPECIAL UNIT | | |
| Primary Schools | ASD | 63 |
| | PD | 12 |
| | MLD | 10 |
| | HI | 12 |
| | SEMH | 21 |
| | SLCN | 1 |
| | SLD | 20 |
| Primary Total | | 139 |

| | | |
|------------------------|-----|-----------|
| Secondary Schools | ASD | 45 |
| | PD | 20 |
| | HI | 5 |
| Secondary Total | | 70 |

| | | |
|--|--|------------|
| TOTAL FOCUS PROVISION & SPECIAL UNIT PLACES | | 209 |
|--|--|------------|

| | | |
|---|--|------------|
| PRUs | | |
| Primrose PRU (Primary) | | 25 |
| Sandwell Community School (Secondary) | | 180 |
| Albright (40 places plus an additional 20 1/4/24-31/8/25) | | 48 |
| TOTAL PRU PLACES | | 253 |

6. Recommendations

- 6.1 That Schools Forum note the contents of the report in relation to the HNB Grant Budget 2024/25.

Julie Gill , Business Lead Inclusive Learning Services

Date: 06/03/2024

Contact Officer: Julie Gill

Email: julie_gill@sandwell.gov.uk

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APPENDIX 1

HNB BUDGET 2024/25

| HIGH NEEDS BLOCK BUDGET SUMMARY | | BUDGET 2024/25 | |
|---------------------------------|--------------------------------------|------------------|---|
| Out of Borough Placements | Non Maintained & Independent Schools | 12,288,200 | Pupils placed in Independent or Non Maintained Special & Mainstream Schools following lack of Provision in borough. |
| Maintained OOB Schools | Maintained OOB Schools | 1,823,000 | Top up for Sandwell pupils placed in other Local Authority Maintained & Academy Special & Mainstream schools |
| Other OOB Expenses KRUNCH | Other OOB Expenses KRUNCH | 40,000 | Alternative Provision KRUNCH Contract |
| Other OOB Expenses Room Hire | Other OOB Expenses Room Hire | 20,000 | Room Hire for NTAS Students |
| Other OOB Expenses NTAS | Other OOB Expenses NTAS | 300,000 | NTAS support for pupils awaiting placement |
| | | 2,183,000 | |
| Other SEN and IS Costs | | 816,500 | See Appendix 2 |
| SEN Developments | | 684,300 | See Appendix 2 |

| Top up and Place funding Delegated to Schools | | |
|--|-------------------|--|
| Top up and Place funding - All schools and PRUs | 44,951,000 | This is the top up funding for all maintained & academy Sandwell Schools. Special, mainstream, focus provisions, special units & PRUS Independent top ups following tribunal rulings |
| Other Top up | 205,000 | |
| Alternative Provision Support Following AP Panel | 270,000 | Pupils in AP settings where support is agreed following presentation at the Alternative Provision Panel |
| Recoupment | -1,759,400 | |
| Top up funding - Colleges and ISPs | 3,078,700 | Top ups for Colleges and ISP post 16 |
| Albright Education Centre & Hospital Support | 1,631,400 | |
| High Cost Equipment | 40,000 | Funding for High Cost Equipment for individual pupils. Schools have to apply. Any pupils that are not in receipt of top up funding will be required to use the £6K notional SEN funding already in schools as part of the formula. Mainstream schools only |
| Total Allocated to Schools | 48,416,700 | |

| Support for Inclusion & SEN | | |
|---------------------------------------|------------------|---|
| Lace | 497,700 | Includes Salaries and running costs for central service |
| SEN Admin | 604,600 | Includes Salaries and running costs for central service |
| Inclusion Support Team | 1,270,900 | Includes Salaries and running costs for central service |
| Sensory Support Team | 1,047,400 | Includes Salaries and running costs for central service |
| Complex Communications Team | 885,400 | Includes Salaries and running costs for central service |
| Early Years Admin Team | 843,400 | Includes Salaries and running costs for central service |
| Preventing Primary Exclusions | 262,200 | Includes Salaries and running costs for central service |
| Social Emotional & Mental Health Team | 751,800 | Includes Salaries and running costs for central service |
| Reintegration Offices Team | 217,500 | Includes Salaries and running costs for central service |
| Exclusions Team | 176,400 | Includes Salaries and running costs for central service |
| SB0015 | 6,557,300 | |

| | |
|---------------------------------|-------------------|
| TOTAL HNB BUDGET 2024/25 | 70,946,000 |
|---------------------------------|-------------------|

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APPENDIX 2

| 6) SEN DEVELOPMENTS | | £ |
|--|--|----------------|
| Primrose PRU additional support | | 84,600 |
| Westminster additional support Post 16 | | 66,000 |
| Westminster additional pupils | To be agreed included to be prudent | 191,100 |
| Black Country Training Group | Additional DFE Deduction expected | 216,000 |
| Albright Education Centre | 20 Places 1/9/24-31/3/25 to be agreed included to be prudent | 116,600 |
| Independent Review Panels | | 10,000 |
| Total Budget 2024/25 | | 684,300 |

| 7) OTHER SEN & IS EXPENSES | | £ |
|--|--|----------------|
| Internal Recharges | Below the line recharges calculated by Finance to cover Finance Human resources, Office Accomodation etc | 508,500 |
| Occupational & Physiotherapy SLA | 2 year SLA agreed 2024/25 & 25/26 £157.5K 2 years to support Focus Provisions | 77,900 |
| Speech and Language SLA | Annual SLA to support Focus Provisions | 5,000 |
| Equal Pay Other Special Schools 2023/24 is year 13 of 15 Years and ends in 2025/26 | It was originally paid through the SS contingency which ceased in April 2013 with the implementation of the national funding formula. ENDS 2025/26 | 50,400 |
| Hospital Recoupment | Pupils placed by CCG in Private hospitals. The resident LA is responsible for the hospital tuition. | 38,700 |
| Medical Malpractice Insurance | Was previously top sliced from schools but now it is a blanket policy and covers all schools | 15,000 |
| Mediation | SEN EHCP mediation Service | 30,000 |
| 2 Part Time Independent Travel Trainers | Agreed as part of service expansion by Schools Forum | 30,000 |
| Joint Commissioning of Occupational Therapy | Agree continuation | 61,000 |
| Total Budget 2024/25 | | 816,500 |

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Report to School Forum

18 March 2024

| | |
|-------------------------|--|
| Subject: | Special Educational Needs and Disabilities (SEND) 2023/24 High Needs Block Budget Monitoring (Period 10) |
| Director: | Interim Director of Children and Education Sally Giles |
| Contact Officer: | Julie Gill Julie_Gill@Sandwell.gov.uk |

1 Recommendations

1.1 The Schools' Forum is requested to note the report.

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), including budget and various related matters. The High Needs block (HNB) is one of the four blocks of funding within the DSG.
- 2.2 The Schools' Forum is requested to comment and note the contents of the report in relation to the 2023/24 HNB budget monitoring for period 10 (April 2023 to end of January 2024 projected to the end of March 2024).



3 How does this deliver objectives of the Corporate Plan?

| | |
|---|---|
|  | <p>Best start in life for children and young people Delegated grant funding of High Needs in support of children with early identification of SEN, and to ensure they are ready for school, and schools being ready for children and families including 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. Delivery of programmes that specifically address language development within the borough, working with schools and families.</p> |
|  | <p>Strong resilient communities Enhancement of existing green spaces, by creating new places to play and commitment of planting a tree for every child starting school up to 2030.</p> |
|  | <p>Quality homes in thriving neighbourhoods Ensure new quality homes being driven by our inclusive Economy principles benefit local people but communities having access to suitable good schools, health services and local amenities.</p> |
|  | <p>A strong and inclusive economy Delivery of new major education facilities and aspiration for SEN children and young people to achieve own goals working with education providers in ensuring good jobs.</p> |

4 HNB Budget 2023/24

- 4.1 The gross 2023/24 HNB allocation is £71.499m, taking account of recoupment (£4.190m) by the Department of Education (DfE) for academies, free schools and post-16 commissioned places, leaves a net grant of **£67.309m**.
- 4.2 Forecast spend at the end of period 10 (October 2023), projected to 31 March 2024 is £67.104m which represents an in year surplus of £0.205m.
- 4.3 Appendix 1 shows the 2023/24 High Needs Block budget, the 2023/24 Spend as at 31 January 2024, the forecast outturn to 31 March 2024, the monetary and percentage variance from the budget. It also shows the



movement from the figures reported to Schools' Forum in December 2023 (period 7).

4.4 The HNB balance as at 31 March 2023 is £5.709m.

4.5 The variances are explained below as detailed in appendix 1:

Variation 1 – Independent Schools £138k Deficit

Placements in Independent schools shows a pressure of £138K against the budget. This is primarily due to children and young people with SEN in Sandwell requiring suitable specialist provision. There is a shortage of suitable SEN places in borough, therefore out of borough settings are currently used in support and to fulfil our statutory responsibilities. The budget of £10.371m included a provision of £1.051m for new placements during the year. This provision has been exceeded by £138K.

Variation 2 – Mainstream Schools Top up funding Delegation £950k Deficit

Increases in the number of EHCPs issued has resulted in a pressure of £950k. The budget of £13.421m included a provision of £2.5m to support the increases in EHCP assessments. There has also been a significant increase in funding for early years pupils in school-based nurseries.

Variation 3 – Focus Provision Place and Top up Funding £199k Deficit

Increases in the number placements in Focus Provisions and the SEN Unit have resulted in an overspend against the budget. The budget is based on full capacity, but some provisions have exceeded agreed placements.

Variation 4 – Early Years Private Providers £210K deficit

There has been an increase in the number of providers requesting funding for pupils in the private provider sector.

Variation 5 – Alternative Provision £250K Surplus

There has been an decrease in the number of pupils supported in alternative providers following the requirement for all requests to be presented at the Alternative Provision Panel



Variation 6 – SEN Support Services & Support for Inclusion £272k surplus

The total variances equate to a saving of £272k across 9 service areas. These are 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.

Variation 7 – SEN Developments £1,204k saving

This Budget is for any expansions that are awaiting full approval, changes in the HNB grant notified by the DFE and the initial surplus calculated at budgeting stage where total budgets prepared are less than the grant.

Variation 8 – Exclusion and Integration £17k overspend

The overspend is due to staff turnover and additional costs for a temporary officer.

5 Implications

| | |
|------------------------------|--|
| Resources: | As presented in this document. |
| Legal and Governance: | 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. |
| Risk: | None |
| Equality: | None |
| Health and Wellbeing: | None |
| Social Value: | None |
| Climate Change: | None |
| Corporate Parenting: | None |



6 Appendices

Appendix 1 – High Needs Block Outturn (period 10) 2023/24

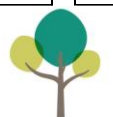
7. Background Papers

None.



Appendix 1
HIGH NEEDS BLOCK 2023/24 FORECAST OUTTURN

| | BUDGET ALLOCATION 2023/24 £ | SPEND as at 31/10/23 LEDGER REPORTS £ | FORECAST END OF YEAR OUTTURN £ | VARIANCE FROM BUDGET £ | % VARIANCE FROM BUDGET | VARIANCE REF IN REPORT | COMMENTS | Predicted Outturn 20/08/23 (P7) £ | Movement from Previous Report (P5) £ |
|---|-----------------------------|---------------------------------------|--------------------------------|------------------------|------------------------|------------------------|--|-----------------------------------|--------------------------------------|
| 1 Out of Borough Placements | | | | | | | | | |
| Independent schools | 10,371,000 | 5,514,918 | 9,967,426 | -403,574 | -3.9% | 1 | Lack of Provision in Borough has meant more Independent Placements are being made at approx 3 per week with slippage. | -593,900 | 190,326 |
| OLA Maintained & Academy Schools | 1,823,000 | -804,217 | 1,823,000 | 0 | 0.0% | 1 | OOB placements in OLA maintained and academy mainstream and special schools now reflects Phase transfers | 0 | 0 |
| Alternative Providers | 340,000 | 136,576 | 340,000 | 0 | 0.0% | 1 | This is for Pupils with EHCPs that attend NTAS and Trageted Provision which are tuition services | 0 | 0 |
| Other associated costs | 40,000 | 0 | 40,000 | 0 | 0.0% | 1 | Room hire for the support of Students receiving NTAS support while awaiting a school placement | 0 | 0 |
| | 12,574,000 | 4,847,277 | 12,170,426 | -403,574 | | | | -593,900 | 190,326 |
| 2 Pupil Top up & Place | | | | | | | | | |
| Mainstream Schools | 13,421,400 | - | 13,421,400 | 0 | 0.0% | 2 | Top up funding above notional budgets in schools | 0 | 0 |
| Focus Provisions | 3,499,533 | - | 3,504,200 | 4,667 | 0.1% | 2 | Assumes full occupancy | 4,667 | 0 |
| Special Schools | 20,016,800 | - | 20,016,800 | 0 | 0.0% | 2 | Special school place plus top up funding | 0 | 0 |
| Primary PRU | 572,000 | - | 572,000 | 0 | 0.0% | 2 | Pupil Referral Unit - Primary provision | 0 | 0 |
| Secondary PRU | 2,772,100 | - | 2,772,100 | 0 | 0.0% | 2 | Pupil Referral Unit - Secondary provision | 0 | 0 |
| High Point Free Special School | 1,397,267 | - | 1,385,600 | -11,667 | -0.8% | 2 | Increase in pupil numbers from Sept 2022 | -11,667 | 0 |
| Elm Tree Free Special School | 778,400 | - | 778,400 | 0 | 0.0% | 2 | Special Free school | 0 | 0 |
| Early Years Private Providers | 730,000 | 477,338 | 730,000 | 0 | 0.0% | 2 | This is offset by support from EYS funding | 0 | 0 |
| Early Years Grant | -480,000 | - | -480,000 | 0 | 0.0% | 2 | EYS income/grant | 0 | 0 |
| Other Support | 205,000 | 139,751 | 205,000 | 0 | 0.0% | 2 | Other | 0 | 0 |
| Post 16 Colleges & Specialist Providers | 3,058,700 | 246,309 | 3,058,700 | 0 | 0.0% | 2 | Post16 demand usually in total by January 24 | 0 | 0 |
| Alternative AWPU Prov | 270,000 | 12,400 | 270,000 | 0 | 0.0% | 2 | AP AWPU | 0 | 0 |
| Recoupment | -1,564,800 | 8,910 | -1,564,800 | 0 | 0.0% | 2 | This is recoupment of top up for OLA pupils placed in Sandwell Schools. The increase is due to an increase in OLA pupils placed in Sandwell schools. | 0 | 0 |
| | 44,676,400 | 884,709 | 44,669,400 | -7,000 | | | | -7,000 | 0 |
| 3 Albright Education Centre | 1,608,600 | -23,450 | 1,608,600 | 0 | 0.0% | | SEMH and Medical provision (in-borough) | 0 | 0 |
| 4 SEN Support Services | 559,000 | 255,900 | 543,600 | -15,400 | -2.8% | 3 | Maternity Leave, staff turnover and reduced hours and other associated expenditure following COVID | -15,400 | 0 |
| 5 Support for Inclusion | | | | | | | | | |
| Lace | 419,000 | 235,025 | 405,831 | -13,169 | -3.1% | 4 | Full time Budgeted post but post holder reduced hours | -17,900 | 4,731 |
| Inclusion Support | 1,182,500 | 637,068 | 1,177,000 | -5,500 | -0.5% | 4 | Staff turnover | -5,500 | 0 |
| Sensory Support Team | 974,600 | 505,347 | 958,100 | -16,500 | -1.7% | 4 | Staffing turnover | -16,500 | 0 |
| CCD Team | 544,500 | 335,811 | 580,600 | 36,100 | 6.6% | 4 | Staffing turnover | 16,100 | 20,000 |
| Early Years Admin | 765,600 | 322,197 | 682,000 | -83,600 | -10.9% | 4 | Materniy Leave and 0.5 vacancy | -83,600 | 0 |
| Preventing Primary Exclusions team | 237,500 | 82,984 | 204,100 | -33,400 | -14.1% | 4 | Staff turnover | -33,400 | 0 |
| SEMH Team | 696,900 | 362,723 | 702,500 | 5,600 | 0.8% | 4 | Full time Budgeted posts but post holders reduced hours | 5,600 | 0 |
| Fair Access Reintegration Officers | 164,400 | 71,671 | 153,000 | -11,400 | -6.9% | 4 | Vacant post | -11,400 | 0 |
| | 4,985,000 | 2,552,824 | 4,863,131 | -121,869 | | | | -146,600 | 24,731 |
| 6 SEN Dvelopment | 1,802,967 | 108,676 | 1,043,467 | -759,500 | -42.1% | 5 | Initial Surplus on calculation of budgets was £630K and additional grant received of £370K | -759,500 | 0 |
| 7 Other SEN Funding | | | | | | | | | |
| Central Recharges | 508,500 | 0 | 508,500 | 0 | 0.0% | 6 | Corporate recharges | 0 | 0 |
| OT & Physio & SALT SLA | 73,100 | 40,495 | 80,100 | 7,000 | 9.6% | 6 | Demand led budget | 7,000 | 0 |
| Equal Pay other SS | 50,400 | 0 | 50,400 | 0 | 0.0% | 6 | Earmarked budget | 0 | 0 |
| Mediation | 30,000 | 2,906 | 30,000 | 0 | 0.0% | 6 | Mediation budget | 0 | 0 |
| Hospital Recoupment | 30,000 | 3,178 | 30,000 | 0 | 0.0% | 6 | Hospital provision and recovery | 0 | 0 |
| Medical Malpractice | 15,000 | 0 | 15,000 | 0 | 0.0% | 6 | Medical budget | 0 | 0 |
| ITT Staff Contribution | 25,000 | 0 | 30,000 | 5,000 | 20.0% | 6 | Recharges | 5,000 | 0 |
| Joint Commissioning Sensory Pilot | 72,500 | 15,394 | 72,500 | 0 | 0.0% | 6 | JCS Pilot | 0 | 0 |
| | 804,500 | 61,973 | 816,500 | 12,000 | | | | 12,000 | 0 |
| 8 Exclusions & Reintegration | 172,900 | 73,736 | 121,200 | -51,700 | -29.9% | 7 | Vacant post | -51,700 | 0 |
| Additional grant | 125,942 | 0 | - | -125,942 | -100.0% | 8 | Additional grant 23/24 as per published tables | | -125,942 |
| TOTAL | 67,309,309 | 8,761,644 | 65,836,325 | -1,472,984 | -2.2% | 9 | Forecast underspend (p7) HNBlock | -1,562,100 | 89,116 |
| check | 67,309,309 | 8,761,644 | 65,836,325 | -1,472,984 | | | check | | |
| | 0 | 0 | 0 | | | | | | |



Appendix 1
HIGH NEEDS BLOCK

| | BUDGET ALLOCATION 2023/24 £ | SPEND as at 31/12/24 LEDGER REPORTS £ | PREDICTED END OF YEAR OUTTURN £ | VARIANCE FROM BUDGET £ | % VARIANCE FROM BUDGET | VARIANCE REF IN REPORT | NOTES | Predicted Variance reported to SF on 11/12/23 | Movement from Previous Report | Narrative |
|---|-----------------------------|---------------------------------------|---------------------------------|------------------------|------------------------|------------------------|--|---|-------------------------------|-----------|
| 1 Out of Borough Placements | | | | | | | | | | |
| Independent schools | 10,371,000 | 8,591,724 | 10,508,998 | 137,998 | 1.3% | 1 | Lack of Provision in Borough has meant more Independent Placements are being made at approx 3 per week with slippage. | -403,574 | 541,572 | |
| OLA Maintained & Academy Schools | 1,823,000 | -436,212 | 1,823,000 | 0 | 0.0% | | OLA placements in OLA maintained and academy mainstream and special schools now reflects Phase transfers | 0 | 0 | |
| Alternative Providers | 340,000 | 178,385 | 340,000 | 0 | 0.0% | | This is for Pupils with EHCPs that attend NTAS and Targeted Provision which are tuition services | 0 | 0 | |
| Other associated costs | 40,000 | 12,304 | 20,000 | -20,000 | -50.0% | | Room hire for the support of Students receiving NTAS support while awaiting a school placement | 0 | -20,000 | |
| | 12,574,000 | 8,346,202 | 12,691,998 | 117,998 | | | | -403,574 | 521,572 | |
| 2 Pupil Top up & Place | | | | | | | | | | |
| Mainstream Schools | 13,421,400 | 0 | 14,371,305 | 949,905 | 7.1% | 2 | | 0 | 949,905 | |
| Focus Provisions | 3,499,533 | 0 | 3,698,058 | 198,525 | 5.7% | 3 | | 4,667 | 193,858 | |
| Special Schools | 20,016,800 | 0 | 20,014,622 | -2,178 | 0.0% | | | 0 | -2,178 | |
| Primary PRU | 572,000 | 0 | 572,000 | 0 | 0.0% | | | 0 | 0 | |
| Secondary PRU | 2,772,100 | 0 | 2,772,100 | 0 | 0.0% | | | 0 | 0 | |
| High Point Free Special School | 1,397,267 | 0 | 1,411,000 | 13,733 | 1.0% | | | -11,667 | 25,400 | |
| Elm Tree Free Special School | 778,400 | 0 | 821,000 | 42,600 | 5.5% | | | 0 | 42,600 | |
| Early Years Private Providers | 730,000 | 790,484 | 940,000 | 210,000 | 28.8% | 4 | This is offset by support from EYS funding | 0 | 210,000 | |
| Early Years Grant | -480,000 | 0.00 | -480,000 | 0 | 0.0% | | | 0 | 0 | |
| Other Support | 205,000 | 166,081.39 | 187,275 | -17,725 | -8.6% | | | 0 | -17,725 | |
| Post 16 Colleges & Specialist Providers | 3,058,700 | 295,325 | 3,058,700 | 0 | 0.0% | | | 0 | 0 | |
| Alternative AWPU Prov | 270,000 | 14,080 | 20,000 | -250,000 | -92.6% | 5 | | 0 | -250,000 | |
| Recoupment | -1,564,800 | 27,034 | -1,564,800 | 0 | 0.0% | | This is recoupment of top up for OLA pupils placed in Sandwell Schools. The increase is due to an increase in OLA pupils placed in Sandwell schools. | 0 | 0 | |
| | 44,676,400 | 1,293,004 | 45,821,260 | 1,144,860 | | | | -7,000 | 1,151,860 | |
| 3 Albright Education Centre | 1,608,600 | -23,450 | 1,608,600 | 0 | 0.0% | | | | 0 | |
| 4 SEN Support Services | 559,000 | 433,670 | 554,100 | -4,900 | -0.9% | 6 | Maternity Leave, staff turnover and reduced hours and other associated expenditure following COVID | -15,400 | 10,500 | |
| 5 Support for Inclusion | | | | | | | | | | |
| Lace | 419,000 | 372,788 | 390,747 | -28,253 | -6.7% | 6 | Full time Budgeted post but post holder reduced hours | -13,169 | -15,084 | |
| Inclusion Support | 1,182,500 | 976,654 | 1,141,890 | -40,610 | -3.4% | 6 | Staff turnover | -5,500 | -35,110 | |
| Sensory Support Team | 974,600 | 770,521 | 940,524 | -34,076 | -3.5% | 6 | Staff turnover | -16,500 | -17,576 | |
| CCD Team | 544,500 | 509,075 | 576,086 | 31,586 | 5.8% | 6 | Staff turnover and Subscription to the National Autistic Society | 36,100 | -4,514 | |
| Early Years Admin | 765,600 | 544,038 | 669,660 | -95,940 | -12.5% | 6 | Staff turnover | -83,600 | -12,340 | |
| Preventing Primary Exclusions team | 237,500 | 159,057 | 193,689 | -43,811 | -18.4% | 6 | Staff turnover | -33,400 | -10,411 | |
| SEMH Team | 696,900 | 554,523 | 658,776 | -38,124 | -5.5% | 6 | Staff turnover | 5,600 | -43,724 | |
| Fair Access Reintegration Officers | 164,400 | 109,551 | 140,634 | -23,766 | -14.5% | 6 | Staff turnover | -11,400 | -12,366 | |
| | 4,985,000 | 3,996,207 | 4,712,006 | -272,994 | | | | -121,869 | -151,125 | |
| 6 SEN Developments | 1,928,956 | 355,576 | 724,800 | -1,204,156 | -62.4% | 7 | Initial Surplus on calculation of budgets was £1.228m and includes additional grant of £125K | -885,442 | -318,714 | |
| 7 Other SEN Funding | | | | | | | | | | |
| Central Recharges | 508,500 | 0 | 508,500 | 0 | 0.0% | | Corporate Recharges | 0 | 0 | |
| OT & Physio & SALT SLA | 73,100 | 54,867 | 80,100 | 7,000 | 9.6% | | SLA for the provision of OT physio and SALT | 7,000 | 0 | |
| Equal Pay other SS | 50,400 | 0 | 50,400 | 0 | 0.0% | | Last payment is 2025/26 | 0 | 0 | |
| Mediation | 30,000 | 18,377 | 30,000 | 0 | 0.0% | | SEND mediation between Parents Carers and the LA | 0 | 0 | |
| Hospital Recoupment | 30,000 | 8,741 | 30,000 | 0 | 0.0% | | Payments to Private providers for education for young people in hospitals outside Sandwell. | 0 | 0 | |
| Medical Malpractice | 15,000 | 0 | 0 | -15,000 | -100.0% | | This is an Insurance policy that covers all schools | 0 | -15,000 | |
| ITT Staff Contribution | 25,000 | 0 | 30,000 | 5,000 | 20.0% | | Forum previously agreed to fund 2 part time independent travel trainers | 5,000 | 0 | |
| Joint Commissioning Sensory Pilot | 72,500 | 12,238 | 72,500 | 0 | 0.0% | | This was agreed to continue following the pilot | 0 | 0 | |
| | 804,500 | 94,223 | 801,500 | -3,000 | | | | 12,000 | -15,000 | |
| 8 Exclusions & Reintegration | 172,900 | 145,335 | 189,913 | 17,013 | 9.8% | 8 | Vacancies and payment for Temp Staff | -51,700 | 68,713 | |
| TOTAL | 67,309,356 | 14,640,767 | 67,104,176 | -205,180 | -0.3% | | | -1,472,985 | 1,267,805 | |
| | 67,309,356 | 14,640,767 | 67,104,176 | | | | | | | |
| | 0 | 0 | 0 | | | | | | | |

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Report to Schools Forum

18 March 2024

| | |
|-------------------------|---|
| Subject: | Schools Forum Work Programme for the 2024/25 Academic Year |
| Contact Officer: | Connor Robinson Connor1_robinson@sandwell.gov.uk |







1 Recommendations

That the Committee notes the work programme / Forward Plan for 2024/25.

2 Reasons for Recommendations

- 2.1 The work programme for 2024/2025 is attached at Appendix 1 for the Forum's consideration. The programme covers the areas that are within the remit of Schools Forum.

3 How does this deliver objectives of the Corporate Plan?

| | | |
|---|---|---|
|  |  | A planned work programme will help Schools Forum understand and achieve its objectives. |
|  |  | |
|  |  | |



4 Context and Key Issues

The work programme / Forward Plan sets out the items to be considered across the 2024/25 academic year.

5 Implications

| | |
|------------------------------|--|
| Resources: | There are no implications arising directly from this report. |
| Legal and Governance: | |
| Risk: | |
| Equality: | |
| Health and Wellbeing: | |
| Social Value | |
| Climate Change: | |
| Corporate Parenting: | |
| | |

7. Appendices

Work programme for the 2024-25 academic year

8. Background Papers

None



Schools Forum 2024/25 Forward Plan

Agreed at SF Meeting 18.03.24

Blue writing = Governance Team
 Red writing = SEN Team
 Green writing = Early Years Team
 Black writing = Finance Team

| Meeting Date | Proposed Agenda Items (Core Business) | Agenda Meetings | Publish Agenda & Reports on CMIS & Circulate to Members | Publish Minutes on CMIS |
|---------------------|--|---------------------|---|-------------------------|
| 30th September 2024 | School Forum Constitution Review and Update Membership & Attendance DSG & High Needs Block Latest Monitoring (P4/Quarter 1) Early Years 2023/4 Outturn Report Early Years 2024/25 Funding Update (2024/25 Funding Rate plus new Early Years Supplementary Grant Rates) School Funding Update - Operational Guide Latest News 2025/26 De-delegated Budgets 2023/24 Outturn & Impact Analysis Consultation - Fair Funding Scheme (if applicable) Disapplication Report (Jing Wang) | 16th September 2024 | 23rd September 2024 | 14th October 2024 |
| 4th November 2024 | DSG & High Needs Block Latest Monitoring (P6/Quarter 2) 2025/26 School Budget Consultation Proposals | 21st October 2024 | 28th October 2024 | 18th November 2024 |
| 9th December 2024 | 2025/26 Early Years Consultation Document - Arrangements for 2025/26 Early Years Provision 2025/26 School Budget Consultation Responses Confirmation of 2025/26 DSG Allocation Fair Funding Scheme Updates (if applicable) | 25th November 2024 | 2nd December 2024 | 20th December 2024 |
| 20th January 2025 | Appointment of Chair & Vice Chair Early Years - results of consultation and Final 2025/26 allocations (Budget Book deadline is 28th February) 2025/26 Schools Draft Budgets (December APT) Pupil Number Growth /Falling Rolls Funding - October census Schools 2024/25 Closedown - Draft Timetable | | 6th January 2025 | 20th January 2025 |
| 17th March 2025 | Forward Plan 2025/26 2025/26 High Needs Block Budgets DSG & High Needs Block Latest Monitoring (P10/Quarter 3) 2025/26 Final School Budgets | 3rd March 2025 | 10th March 2025 | 31st March 2025 |
| 7th July 2025 | High Needs Block Outturn 2024/25 DSG & School Balances 2024/25 S251 - Budget 2025/26 | 23rd June 2025 | 30th June 2025 | 21st July 2025 |

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