

Minutes of Schools Forum

Monday 20 March at 2.30pm
in the Sandwell Council Chamber, Sandwell Council House, Oldbury

Present: N Toplass (Chair)
M Arnall, S Baker, J Barry, E Benbow, D Broadbent,
K Hazelwood, C Handy-Rivett, D Irish, W Lawrence, S Mistry
and J Topham

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

10/23 **Minute Silence**

Schools Forum observed a minute silence in respect of Governor representative Bob Patel who had recently passed away.

11/23 **Apologies for Absence**

Apologies for absence were received from Deborah Steen, Lucy Bray and Michael Jarrett

12/23 **Declarations of Interest**

No declarations of interest were made.



13/23 **Minutes**

Resolved that the minutes of the meeting held on 16 January 2023 be approved as a correct record.

14/23 **School Budgets 2023/24 (including Early Years & High Needs)**

Schools Forum were updated on the final school budget information for the financial year 2023/24.

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

The Schools Block funding which was distributed through the main funding formula was noted as:

| Description | £ |
|---|--------------------|
| Schools Block DSG | 325,898,910 |
| Less 2023/24 NNDR (Rates) | (2,716,494) |
| DSG Schools Block after NFF NNDR deduction | 323,182,415 |
| Less Contribution from Schools Block to Central School Services Block | (455,000) |
| Less Pupil Number Growth Contingency | (1,671,000) |
| Schools Block DSG Available to Distribute | 321,056,416 |



The APT model submitted to Schools Forum for approval in January had been cleansed/ revised, the changes submitted by the DfE were noted as:

- The column reflecting “growing schools” had been updated. This had resulted in a shortfall within the APT funding model of £712,000 as schools that opened in the last 7 years were exempt from the capping and scaling exercise.
- The PFI calculations within the APT funding model had to meet the DfE minimum 7% uplift requirement (originally 4%). This was not known at the time and resulted in a further shortfall of £60,000.
- The rates for two schools recently converting to academy were adjusted resulting in an additional shortfall of £20,000.

The update resulted in a revision to the capping and scaling percentages as follows:

| | Capping | Scaling |
|---------------------------|---------|---------|
| APT January Schools Forum | 1.41% | 49.7% |
| APT Final DfE Approved | 0.31% | 40.07% |

The change meant that, gains up to 0.31% were kept by schools, and any gains above 0.31% were scaled back by 40.07%.

The capping and scaling was reflected in the 2023-24 schools funding tables as a negative Minimum Funding Guarantee (MFG).

The school funding model had been approved by the DfE on 24 February 2023 and the tables to support the Schools Block element of funding was issued to schools on 28 February 2023.

The submitted tables were revised 3 working days later on 6 March 2023 as there had been an error on the presentation on Table A. The revision concerned the (MFG) and adversely affected 64% of



schools. A correction had been sent out with an apology and a full explanation.

A full worked example for MFG for each school had been included with the revised budget tables to demonstrate exactly how the capping and scaling had been calculated.

The factor rates for the local authority formula applied to school's budgets for 2023/24 was as follows:

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



School Forum members expressed serious concerns over the mistakes that had been made with regards to the budget and wished to express this formally. Members were concerned around the ability to work in partnership with the Council and how the inflexibility of the close down timetable and subsequent mistakes had meant additional pressures being placed on school staff.

Council officers apologised for the mistake and explained the mistake was a result of a minor administrative error that unfortunately had had a sizable impact. Officers additionally recognised that information relating to the error had not in some circumstances been sent to the headteachers but rather just the financial officers. Officers confirmed that extra checks were now in place to ensure mistakes were not repeated.

Schools Forum questioned why the capping and scaling had been changed considering a level had been approved at the last Forum meeting.

Schools Forum heard that in order to reach the necessary level of funding across the school budgets the capping and scaling had to be reduced.

Schools Forum noted the content of the final school budgets for the financial year 2023/24.

15/23 **High Needs Block (HNB) Budgets 2023/24**

Schools Forum were updated on the HNB 2023/24 Budget Information.

The HNB Provisional Grant for 2023/24 was £71.519million. After deductions of £3.782million the grant available for distribution was equated to £67,737million.



The table on 2023/24 reductions showed the deductions of £3.782million which had been made at source to the HNB and paid directly to the various educational establishments.

The deductions had been revised during the year and notified to the Council if applicable. A further deduction was anticipated for the agreed increased in commissioned places at Shenstone Lodge/ Brades equating to £250K and Sandwell College £70K. Both of these items had been accounted for in the budgeted figures for 2023/24.

Discussions were ongoing in respect of Teachers Pay and Teachers Pensions Grant and the Special Schools Additional Grant. These would be allocated to budget heads once agreed.

| Deductions 2023/24 | £000 |
|--|--------------|
| Pre 16 Focus Provision Academy place deductions | 432 |
| Special school Academy and Free school Place deductions | 1,880 |
| Post 16 SEN mainstream maintained and academy deductions | 54 |
| Post 16 Further Education College Deductions | 1,416 |
| Total Deductions 2023/24 | 3,782 |

HNB 2023/24 Budget Allocations

| Budget Heading | Budget 2023/24 £000 | % |
|------------------------|--------------------------------|----------|
| 1) Independent Schools | 10,371 | 15.31% |



| | | |
|---|---------------|----------------|
| 2) Other LA Maintained and Academy Mainstream and Special Schools pupil support | 1,823 | 2.69% |
| 3) Support for pupils awaiting Placement (NTAS, KRUNCH, Targeted Support Etc) | 380 | 0.56% |
| 4) Top up and Place funding delegated top Maintained & Academy Special & Mainstream Schools, Free School and PRUS | 46,708 | 68.95% |
| 5) Support Services for Inclusion ad SEN | 5,677 | 8.38% |
| 6) SEN Developments | 2,021 | 2.98% |
| 7) Other SEN & IS Costs | 757 | 1.12% |
| Total HNB Grant 2023/24 | 67,737 | 100.00% |

Budgeted Specialist places

The HNB had budgeted for 1335 whole time equivalents (WTE) Specialist Places in Sandwell Provisions across Special Schools, Mainstream Focus Provisions and PRUs. This was an increase of 68 additional places from the 2022/23 budget that was reported to Schools Forum in March 2022.

The Commissioned Specialist Places & PRU Places table shows the places commissioned for the financial year 2023/24. These were WTE where places are commissioned from 1 September 2023.

| SPECIAL SCHOOLS | Places |
|------------------------|---------------|
| The Orchard | 147 |
| The Meadows | 215 |



| | | |
|--|--|------------|
| The Westminster School | | 241 |
| Shenstone Lodge and Brades | | 120 |
| High Point (Commissioned places is 90 but anticipate 92 on roll) | | 92 |
| Elm Tree from 1/9/22 (WTE 1/4/23-31/3/24) Actual Commissioned places as at 1/9/23 is 54) | | 40 |
| Westminster SPI | | 10 |
| Additional places budgeted for in year across all Special Schools for potential over occupancy from 1/9/23 WTE | | 10 |
| TOTAL | | 875 |

| | | |
|--|------|------------|
| FOCUS PROVISIONS & SPECIAL UNIT | | |
| Primary Schools | ASD | 58 |
| | PD | 12 |
| | MLD | 10 |
| | HI | 12 |
| | SEMH | 22 |
| | SLCN | 1 |
| | SLD | 20 |
| Primary Total | | 135 |

| | | |
|-------------------|-----|----|
| Secondary Schools | ASD | 45 |
|-------------------|-----|----|



| | | |
|--|----|------------|
| | PD | 20 |
| | HI | 5 |
| Secondary Total | | 70 |
| TOTAL FOCUS PROVISION & SPECIAL UNIT PLACES | | 205 |

| | | |
|---------------------------------------|--|------------|
| PRUs | | |
| Primrose PRU (Primary) | | 25 |
| Sandwell Community School (Secondary) | | 180 |
| Albright | | 50 |
| TOTAL PRU PLACES | | 255 |

Schools Forum noted the report in relation to the HNB Grant Budget 2023/24.

16/23 High Needs Block P11 Monitoring

Schools Forum was provided with the HNB monitoring position as of 28 February 2023 projected to 31 March 2023.

The HNB budget for 2022/23 reported to Schools Forum on 26 September was £60.808million, net of deductions.

The balance bought forward as 1 April 2022 was £3.930million surplus.

The anticipated in year deficit was at 30 November 2022 projected to 31 March 2023 was previously reported to Schools Forums noted as £1.266million.



The current position as at 28 February 2023 projected to 31 March 2023 was now an in-year surplus of £0.197million.

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

Variation 1 – Independent Schools

Out of borough placements, show a budget pressure of £1.427million. This was less than the previously reported figures of £2.039million due to slippage in the dates when pupils were expected to take up places and a reduction in the anticipated tri part funded places following a meeting in January 2023 with Sandwell Social Care Trust. A contingency sum had been included for new placements equating to £700K which had now been removed as these placements would not occur in this financial year. However, they would impact next year.

The Placement and Provision Panel were placing 2-3 pupils per week in the Autumn term and this appeared to have slowed down slightly, although an upturn was expected September 2023 following 2022 phased transfers exercise.

Variation 2 – Mainstream Schools

There had been an increase in both EHCP assessments and the funding of early years pupils which had resulted in a pressure of £730K in delegated funding to school for individual pupil support which was an increase from previously reported figures following closure of the delegation. Previously reported was £683K

Variation 3 – Focus Provision Schools

There had been an increase in EHCP assessments which had resulted in a projected overspend of £175K on the delegated funding provided to Focus Provisions. On closing down the delegation this was now a pressure of £173K.

Variation 4 – SEN Special Unit

A new Special Unit had been agreed at Uplands Primary School. It was previously budgeted for within the SEN Developments cost centre when the budgets for 2022/23 were finalised as discussions were still underway with the school at that point. More Pupils had



been placed in the provision than was expected in November 2022 therefore funding increased from £186K to £214K.

Variation 5 – High Point Special School

There are more pupils on roll at High Point from 1 September 2022 than was anticipated when the budget was prepared. Therefore, there was a pressure of £186K, however, now the delegation was closed the pressure is £156K

Variation 6 – Early Years

An amount of £480k from the Early Years Grant was used to offset the early support for pupils in private provider settings and those in mainstream early years settings. Predicted costs in private provider settings had increased from £710K previously reported to £850K as more and more support for early years is being requested. The support for EYS pupils in mainstream schools is set against the schools' delegation and not shown separately. The £480k will be insufficient to cover the full costs of meeting the needs of the pupils in the early years settings. There is a pressure of £300K against private providers alone.

Variation 7 – Recoupment

The Element 3 top up for pupils placed in Sandwell schools that are the responsibility of a neighbouring LA are funded by Sandwell for all pupils in the special schools and LAC pupils placed in mainstream schools. This was recouped from the relevant authority. There had been an increase in pupils being placed which had resulted in an increase in recoupment income, with Shenstone being the highest importer of pupils due mainly to the location of the school. This had resulted in an additional £140K more recoupment than was originally expected.

Variation 8 – Albright Education Centre

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

Variation 9 – SEN and Support for Inclusion Services

The total variances equate to a saving of £484K across 10 service areas. These were mainly due to staff turnover, maternity leave,



opting out of the LA superannuation scheme and full time budgeted posts covered by staff on reduced hours and the inclusion of 2022/23 pay awards. The savings within these areas would increase during the year following slippage in staff appointments.

Variation 10 SEN

SEN Developments was showing an underspend of £1.6million – This budget head currently covered independent appeals and reports. It also held the HNB surplus balancing figure of £630K, which was the difference between the calculated budgets as at 1 April 2022 and the HNB Grant initial settlement 2022/23 as well as the additional grant received in July 2022. The funding for the Special Unit was held here and was now accounted for in variance 4 Above

Schools Forum noted the variations to the High Needs Block.

17/23 **Fair Funding Scheme Updates**

Schools Forum considered the Scheme for the Financing of Schools.

A small change to the Fair Funding Scheme had been identified in respect of the approval of Direct Debit / Standing Order transactions.

Appendix A of the Fair Funding Scheme (School Bank Account Scheme) reference 1.12 (page 20) stipulates:

“Direct Debits, standing orders (other than those for Sandwell MBC charges or traded services) BACS or other electronic means of payment must not be applied to the account, without obtaining the written authorisation of the Chief Finance Officer.”

The proposed change concerns the written authorisation. It was proposed that this change be from the Chief Financial Officer to the Finance Business Partner.



Resolved that:-

the update to the Scheme for the Financing of Schools be approved.

18/23 Forward Plan 2023/24

Schools Forum noted the items of the 2023/24 Schools Forum Forward Plan.

Schools Forum was advised that the deadlines within the Forward Plan reflected those required by the DfE. It was therefore difficult to change any proposed dates without having a detrimental effect on the ability to meet the deadlines. However, officers would work to ensure that schools were informed and had the necessary time to engage with any consultation.

19/23 AOB

Schools Forum considered the membership of the ongoing Working Groups and the appointment of substitute members and work would be undertaken to ensure appointments.

Meeting ended at 3.52pm

Contact: democratic_services@sandwell.gov.uk

