

# Minutes of Schools Forum

**Monday 8 March 2021 at 2.30pm**  
**Virtual online meeting via MS Teams**

**Present:**

D. Irish (Chair)  
N Toplass (Vice Chair), M Arnall, J Bailey, S Baker, L Bray, J Barry, W  
Lawrence, G Linford, K Morgan, E Pate and P Shone,

**Officers:** C Ward, R Kerr, A Timmins, S Lilley, M Tallents, J Gill, S Parkes and C  
Robinson.

**9/21 Apologies:**

Apologies were received from D Barton, L Howard and J Topham.

**10/21 Declarations of Interest**

There were no declarations of interest

**11/21 Minutes**

**Agreed** that the minutes of the meeting held on 18 January 2021 were  
a correct record

**12/21 School Budget Information 2021/22**

Schools Forum received a report in respect of the final school budget  
information for the financial year 2021/22.

The Schools Block funding which had been distributed through the main  
funding formula was £296,454,110 and calculated as follows.



Description	£
Schools Block DSG	297,545,210
Less Pupil Number Growth Contingency	(1,091,100)
Schools Block DSG Available to Distribute	296,454,110

The school funding model had been approved by the DfE and received on 3 February 2021.

The Schools Block element of funding had been issued to schools on Monday 8 February 2021, this included notification of the funding entitlement based on the agreed authority formula, minimum funding guarantee and adjustments for de-delegations and educational functions for maintained schools.

The factor rates for the local authority formula to be applied to school's budgets for 2021/22 were as follows:

Item	Primary	Secondary
Primary : Secondary Ratio	1	1.27
Basic Entitlement (AWPU)	£3,512	£4,977
IDACI Band E	£77	£350
IDACI Band D	£485	£676
IDACI Band C	£551	£771
IDACI Band B	£602	£855
IDACI Band A	£630	£900
Prior Attainment (Low Cost, High Incidence SEN)	£1225	£1776
EAL (2 years)	£846	£1227
Lump Sum	£129,057	£129,057
Split Site	£129,057	£129,057
Rates	Actual	Actual
PFI	Actual	Actual
MFG	2.00%	2.00%
MFG	No Ceiling	No Ceiling

**Agreed** that Schools Forum noted the contents of the report.



## Early Years Funding Rates 2021/22 – Consultation responses

Schools Forum were advised of the outcome of the consultation on the increase to the hourly rates for two year olds and three and four year old for the financial year 2021/22.

The early years national funding formula hourly rates had increased by £0.08 per hour for two-year olds and £0.06 per hour for three and four years olds.

The consultation had been sent out on 1<sup>st</sup> February to 102 Day Care Providers and 122 Child Minders. The deadline for the consultation was Friday 12 February 2021.

The proposed funding structure was as follows:

	Rate 2020/2021	Rate 2021/2022	Increase per hour
<b>Two Year Olds</b> Rate= per hour per child	£5.30	£5.38	£0.08
<b>Three and Four Year Olds</b> Rate= per hour per child	£4.00	£4.06	£0.06
<b>Flexibility</b> per hour per child	£0.30	£0.30	N/A
<b>Deprivation</b> Based on % of children and <u>their</u> postcode	Up to 10% = 0 11% to 30% =£0.05 31% to 70% = £0.10 70% to 90% = £0.20 90% plus = £0.25	Up to 10% = 0 11% to 30% =£0.05 31% to 70% = £0.10 70% to 90% = £0.20 90% plus = £0.25	N/A

79 providers completed the online survey; 4 providers submitted email responses (Total responses = 83) This represented 37% of providers who were sent the consultation. 32 responses from Child Minders and 51 responses from Day Care Providers.

Responses to the central question were as follows:

- Do you agree that Sandwell Council should use the additional Early Years funding to increase the basic rate of funding for Two Year Olds and Three and Four Year Olds?
  - 81 – Yes
  - 2 - No



The 2 – No responses gave the following reasons:

- 1 Child Minder added I feel that the 2 year old funding already matches many childminders hourly rate so we do not make a loss. However, I am finding a lot of families use the 3 to 4 year old funding ... I find that the rate is much lower than my hourly rate and there for make a financial loss when families become entitled to the funding. Of course, in the times of the pandemic this really doesn't help. Therefore, I feel that the funding should be used to increase the 3 to 4 year old funding as the rate of the 2 year old funding was satisfactory enough”
- **1 Day Care provider** made the following comments; “In regard to the increases ...this is not in line with inflation of the National Minimum Wage. Last year the NMW went up 51 p and we do not know what the increase is to be this year but more than likely it will be the same increase. If you work out the cost of staff in the two years room on a ratio of four children to one staff, then we are obtaining a 32 p increase which does not apportion the NMW increase of 51 p. Even in the three years room, the ratio will allow one staff to have eight children which is 48 p and this is still below the 51p increase. This is on the basis that we are at full occupancy which is usually never the case for us. Granted we have the flexibility to account but there are other overheads that we need to account for. This is the reason why I have disagreed with the rate increase. Please review once again from our perspective.”

Other responses from providers were included in the report.

The Early Years representative stated that providers accept the rate, however it was insufficient due to the minimum wage increase. Nurseries had incurred additional costs and had responded appropriately.

The Chair asked that when the decision was taken to Cabinet the comments of the providers be included in the report to Cabinet.

The Chair asked that Schools Forum Members vote on the following

1. Approve the increase of the Two Year olds hourly rate from £5.30 to £5.38.

Votes For: - 11      Votes Against -      0      Abstained -      0

2. Approve the increase of the Three and Four year olds hourly rate from £4.00 to £4.06.



Votes For – 11      Votes Against -      0      Abstained -      0

**Agreed that:-**

- (1) the increase of the Two Year Olds hourly rate from £5.03 to £5.38 be approved;
- (2) the increase of the Three and Four year olds hourly rate from £4.00 to £4.06 be approved.

**14/21      Schools in Financial Difficulties – Applications for consideration**

Schools Forum Members were requested to consider the recommendations made by the Schools Forum Sub Committee meeting held on 12 February 2021 in respect of deficits that had been incurred by two schools at the point of academisation.

The Sub Committee had received background information and details of the financial position of both schools and the recommendation of the Sub Committee was that School Forum approved the allocation of Schools in Financial Difficulties fund to meet the deficit positions left behind by the schools.

A vote was undertaken and the results were as follows:

Votes For -    10      Votes Against -      0      Abstained – 0

**Agreed** to approve the recommendations of the Schools Forum Sub Committee meeting held on the 12 February 2021, that deficits incurred by Stuart Bathurst Secondary school and Newtown Primary school, at the point of academisation, be met by the Schools in Financial Difficulties Fund.

**15/21      SEN High Needs Block 2020/21 – P10 Monitoring Report January 2021**

Schools Forum received a report in respect of the High Needs Block monitoring position as at 31 January 2021 projected to 31 March 2021.

The High Needs Block grant for 2020/21 was £48.583m.

A report presented to Schools Forum on 18 January 2021 reported an in year deficit of £0.193m and a balance brought forward as at 1 April 2020 was £0.561m deficit.



The current position as at 31 January 2021 was an in year surplus of £0.938m, the movement between the monitoring periods was a positive £1.131m.

The movements in monitoring between the two periods was as follows:-

	<b>Movements £000</b>
1) Out of Borough Placements – As most invoices have now been received any additional placements will be at a minimum, the adjusted in year allowance for new placements has been removed.	139
2) Schools Delegation - Mainstream, Focus Provisions and Special School top up delegations have been finalised and will not change again this financial year. Therefore, the adjusted in year allowance has been removed.	264
3) Increase in Recoupment - There has been an increase in income from other Local Authorities for pupils placed in Sandwell special schools during the year where the information in respect of recoupment has just been received.	200
4) Developments - The expansions in Focus Provision that were initially accounted for in 'Developments' have now been included in the FP Delegation and are no longer a pressure on this budget head.	257
5) Grant Adjustments - Additional grant adjustments have been notified to the LA following the finalisation of Census figures and a large amount of cross checking. This will be received in March 2021	245
6) Other - various small cumulative movements which are attributed mainly to staffing	26
<b>TOTAL</b>	<b>1,131</b>

The movements meant the 2019/20 deficit brought forward would be cleared and there would be a small surplus going into 2021/22, final figures pending. Officers explained that a small contingency had been built in when estimating cost of out of borough placements, however some of the places had not been used and invoices returned had meant there had been a surplus.



**Agreed** that School Forum members noted the contents of the report.

## 16/21 High Needs National Funding Formula Review – Consultation

Schools Forum was advised that on 10<sup>th</sup> February 2020 the Department for Education had issued a consultation on “Review of national funding formula for allocation of high needs funding to local authorities: changes for 2022-23”. The deadline for responses was 24<sup>th</sup> March 2020.

The authority welcomed feedback on all questions to assist in providing a response for the Sandwell area and encouraged all schools and establishments to submit a response directly to the Department for Education.

The Chair requested that Council Officers ensured that the document was forwarded to all Secondary and Primary Schools.

**Agreed** that Schools be encouraged to participate in the consultation and provide feedback.

## 17/21 Consultation on funding allocation to Westminster Special School

Officers requested that this matter be deferred to a future meeting of Schools Forum.

**Agreed** that the item be deferred to a future meeting of Schools Forum.

**The Next Virtual Meeting of Schools Forum: 14 June 2021 @ 2.30pm**

**Meeting ended at 15.29**

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



**Schools Forum**

**14 June 2021**

**Future Insurance Options for Sandwell Maintained Schools**

**This report is for decision**

**1. Recommendations:**

- a. Schools Forum members note the insurance options available under the Department for Education's (DfE) 'Risk Protection Arrangement (RPA)', and the offer from the council for comparative insurance cover and insurance services.
- b. Maintained school members of Schools Forum **approve or do not approve** that all schools remain within the council's programme of insurance, with schools being charged a fixed premium per pupil (or per place in the case of special schools and pupil referral units (estimated at £24 per pupil for 2021/22)).
- c. Maintained school members of Schools Forum **approve or do not approve** utilisation of the DfE's risk protection arrangements for insurance cover (at £19 per pupil for 2021/22).

**2. Purpose**

- 2.1 To set out and consider the insurance options available to maintained schools in Sandwell, following the Department for Education's (DfE) extension of the Risk Protection Arrangements (RPA) to local authority maintained schools (LAMS) on 1 April 2020.

**3. Links to School Improvement Priorities**

- 3.1 The programme of insurance helps in the mitigation of risks relating to the protection and continued safety of school assets, teachers, pupils and visitors to schools which directly impact the delivery of the school improvement priorities.



#### **4. Report Details**

- 4.1 On 1 April 2020, the DfE extended the risk protection arrangement (RPA), which was previously only available to academy schools to the local authority maintained school (LAMS) sector. Membership of the RPA is on an opt in basis and is an alternative to commercial insurance arrangements which all Sandwell maintained schools currently have.
- 4.2 Sandwell maintained schools are currently insured as part of the wider programme of insurance across the whole of the council's services and activities. The current insurance arrangements were procured in 2018 as part of a long term agreement (LTA) which tied the council (and its schools) into the LTA for a minimum period of three years from 1 October 2018 to 30 September 2021.
- 4.3 On 17 March 2021, Cabinet gave approval for the council to conduct a tender exercise to secure appropriate insurances and enter into new LTAs for the period from 1 October 2021.
- 4.4 Given the above, it is therefore now appropriate to also consider whether this procurement exercise, should include arrangements for maintained schools in Sandwell or whether maintained schools wish to become members of the government's RPA scheme.
- 4.5 This report therefore sets out the following:
- The insurance options available to Sandwell maintained schools
  - The pros and cons of each of these options
  - Details of the insurance covers that Sandwell maintained schools will have if it remains with the council compared to the RPA

#### **Options Available and Assessment of Options**

- 4.6 In response to the expansion of the RPA scheme, the council has undertaken significant work to seek to be able to offer alternative options and to ensure that any decisions taken are informed and are based on a long term view of the impacts of risk protection and risk transfer over a period of time and not based solely upon headline rates.

4.7 There are a number of options that could be considered for the future arrangement of insurance for schools, including continuing with the existing arrangements. However, it is understood that a key area of concern from schools, with the current arrangements is the fluctuations in insurance recharges from one year to the next, which make annual budgeting for this expenditure difficult for schools. The fluctuations arise due to a number of factors including changes to insurance premiums (which are not known until the renewal process is completed in October) and also the claims history which again is subject to significant fluctuations from one year to the next.

4.8 Given the above, only two options are being put forward as follows:

Option 1 – All schools join the RPA scheme

Option 2- All schools remain within the council’s programme of insurance, with schools being charged a fixed premium per pupil (or per place in the case of special schools and pupil referral units).

4.9 The table below sets out the details of the covers that will be provided under each option.

**Table 1 – Comparison of Insurance Cover Offered by the council and the RPA**

Insurance	Council		RPA	
	Cover	Excess	Cover	Excess
Property/ Material Damage (as per specified peril)/	✓	See Note 1	✓	See Note 2
Contents (as per specified perils)	✓	See Note 1	✓	See Note 2
Terrorism	✓	See Note 1	✓	See Note 2
Business interruption	✓	See Note 1	✓	See Note 2
Works in progress/ CAR	✓ - £5m	See Note 1	✓ - £250k	See Note 2
Elections	✓	£0	✗	
Money	✓	See Note 1	✓	See Note 2
Fidelity Guarantee/ employee dishonesty	✓	See Note 1	✓	See Note 2
Computers	✓	See Note 1	✓	See Note 2

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Public Liability	✓	£0	✓	£0
Employer's Liability	✓	£0	✓	£0
Hirer's Liability	✓	£0	✓	£0
Motor / minibuses	(*)	See Note 3	✗	n/a
Engineering Inspection	✓	See Note 1	✗	n/a
Personal Accident	✓	£0	✓	£0
School Journey	✓	£0	✓	£0
<b>PRICE PER PUPIL PER YEAR</b>		<b>£24</b>		<b>£19</b>

1. Note 1 – Excess of £500 applies to primary schools and £1,000 to secondary schools during the period of the LTA
2. Note 2 - Excess of £250 applies to primary schools and £500 to secondary schools
3. Note 3 (\*) Minibus cover is available at an additional charge of £850 per vehicle per year with a £250 excess in the event of a claim.

### Advantages and disadvantages

- 4.10 The RPA does not technically constitute an insurance 'policy', but in practical terms it operates in identical fashion.
- 4.11 Under both options, there is the advantage to schools of certainty in premiums for the year.
- 4.12 The scope and terms of covers provided by the RPA in most areas (see section 5 below) are at least equal to the Council's corporate insurance under option 2 in nearly all areas – the key exceptions being:
  - Motor / minibus insurance is not offered/ covered by RPA but is available under option 2 and is offered at the existing rate of £850 per vehicle per year;
  - Contract Works cover is limited to £250,000 (compared to £5m cover provided under the council insurance provision). If work exceeding the RPA limit is planned, then additional cover will need to be arranged.
  - Statutory inspection (known as engineering inspection) of lifts, boilers, etc is not provided by the RPA. However, this is included under the council cover.
  - Employee dishonesty is limited to £500,000 under the RPA whereas under the council option it is £15m.

- Cover for money (and money in transit) is limited to £5,000 under the RPA, whereas the council cover has a limit of £10,000 during the business day but £2,500 in transit.
- The RPA has an unlimited indemnity for public and employers liability whereas the council option under the current arrangement has a limit of £50m.
- The costs of schools' insurance under either option will provide certainty and enable improved budgeting.

4.13 The RPA provides a full claims handling service directly to schools purchasing its service, details of which are available on the RPA website. This will mean that any claims would need to be handled directly by the school and the RPA claims handling service. Should the council's insurance team be required to get involved in the claim to support the process, then it is envisaged that the school will be charged a minimum of £1,000 per claim, which will depend upon the complexity of the claim and resource required.

4.14 Given the expiry of the current arrangements on 30 September 2021, schools will be charged by the council under either option. Under option 1, all schools would need to leave by this date. In the event that this was not possible, then they would remain under the council's current scheme for the intervening period and be recharged for a share of the council's programme costs (calculated on the current basis) for the period 1 April 2021 to when they join the RPA, in addition to a pro rata charge for the premium payable under the RPA scheme.

4.15 Under option 2, schools will be recharged at a rate of £24 per pupil for 2021/22.

### **Consultation**

4.16 The details above have been shared with the Joint Executive Group (JEG) on 11 March 2021, where members of the Group all indicated a preference for Option 2. JEG noted the significant benefits that schools derived from the support provided by the council's Risk and Insurance service across the entire programme of insurance and processes involved.

## **5. Recommendations**

- 5.1 The council has considered its programme of insurance for maintained schools and is offering to provide the full range of insurance cover as offered by the RPA at a rate of £24 per pupil.
- 5.2 Whilst the rate is slightly higher than the rate offered by the RPA it does still include engineering inspection cover within the price (which the RPA does not), and also provides schools with the benefit of a local named response / support for managing insurance activity and claims on behalf of the school.
- 5.3 The covers under the RPA are set out at Appendix 1.
- 5.4 It is therefore recommended that maintained schools of the Schools Forum note the options available for insurance and votes on its preferred option.

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Finance Business Partner
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Date:	1/6/2021
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**The RPA LAMS membership rules - what the scheme will cover**

The risk protection arrangement for LAMS will cover:

<b>Type of risk</b>	<b>Limit</b>
Material damage	Reinstatement value of the property
Business interruption	£10 million any one loss
Employers' liability	Unlimited
Third party liability	Unlimited
Governors' liability	£10 million any one loss and any one membership year
Professional indemnity	Unlimited
Employee and third party dishonesty	£500,000
Money	Various, including cash on premises or in transit £5,000
Personal accident	Death and capital benefits £100,000
United Kingdom travel	Baggage and money £2,000 per person. Cancellation £1,000 per person
Overseas travel including winter sports	Includes: baggage £2,000 in total per person (inner limits apply), money £750 per person, medical expenses £10,000,000, cancellation £4,000 per person..
Legal expenses	£100,000 any one loss and any one membership year
Cultural assets	£10,000 on any one cultural asset or £250,000 any one multiple loss

**Agenda Item 5**

**Schools Forum**

**14th June 2021**

**School Balances 2020/21 and Budget Plans 2021/22**

**This report is for information**

**1. Recommendations:**

That Schools Forum members:

- 1.1 Note the balances held by schools at the end of 2020-21 and the projected balances for 2021-22.

**2. Purpose**

- 2.1 That Schools Forum note the balances held by schools at the end of 2020-21 and the projected balances for 2021-22.

**3. Links to School Improvement Priorities**

- 3.1 School governing bodies have a responsibility to set a balanced budget annually and to use available resources effectively to deliver high quality education to children. It is important that schools balance budget priorities well whilst planning for any foreseeable changes in coming years. Schools should take effective action to avoid deficit budgets or excessive balances above recommended limits.

**4. Report Details**

- 4.1 **School Balances 2020-21**

4.1.1 **Appendix 1** shows the total school balances as at the end of 2020-21. This is summarised below and compared to the position at the end of 2019-20.

	<b>2019-20</b> <b>£m</b>	<b>In Year</b> <b>Movement</b> <b>£m</b>	<b>2020-21</b> <b>£m</b>
<b>Budget Share</b>	21.886	8.437	30.323
<b>Capital</b>	0.844	(0.140)	0.704
<b>Other Funds</b>	0.593	0.089	0.682
<b>Total</b>	<b>23.323</b>	<b>8.386</b>	<b>31.709</b>

4.1.2 There were no schools closing with a deficit budget share.

4.1.3 There were four schools that converted to an academy during the financial year 2020/21; Stuart Bathurst High school, Newtown Primary school, St Mary's Catholic Primary school and Shenstone special school.

#### 4.2 **Budget Plans 2021-22**

4.2.1 **Appendix 2** shows the projected balances for 2021-22 as indicated by the Budget Plans received from schools. Percentages are highlighted according to the following criteria: -

	<b>Primary/Special</b>	<b>Secondary</b>
<b>Red</b>	Less than 1% or greater than 10% balance	Less than 1% or greater than 8% balance
<b>Amber</b>	1%-2% OR 8%-10% balance	1%-2% OR 5%-8% balance
<b>Green</b>	2%-8% balance	2%-5% balance



- 4.2.2 Thirty four primary schools are projecting to hold balances above 10% and five primary schools are projecting to hold balances below 1% at the end of 2021-22. This is an increase of 4 schools projecting balances above 10% and a decrease of 2 schools projecting balances below 1% based on their 2020-21 budget plans.
- 4.2.3 There is one secondary schools projecting to hold balances above 8% and one secondary schools is projecting holding balances below 1% at the end of 2021-22. There is an increase of one in the number of schools projecting balances above 8% and a decrease of one schools projecting balances below 1% based on their 2020-21 budget plans.
- 4.2.4 There is one special school projecting to hold a balance above 10% and no special school is projecting to hold a balance below 1%. There is no change in the number of schools projecting balances above 10% and there is no change in the number of schools projecting balances below 1% based on their 2020-21 budget plans.
- 4.2.5 There is one projecting a deficit balance at the end 2021-22; Hamstead Infants. The authority will be working with this school to review their budget plan and agree a licensed deficit plan where appropriate and it will put plans in place to regularly review the financial position of the school going forward.

## **5. Recommendations**

That Schools Forum:

- 5.1 Note the balances held by schools at the end of 2020-21 and the projected balances for 2021-22.

Rosemarie Kerr, Principal Accountant – Schools

Date: 08/06/2021

Contact Officer: Rosemarie Kerr

Tel No: 0121 569 8318

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SCHOOL BALANCES 2019-20 & 2020-21

School	2019-20					2020-21					MOVEMENT BETWEEN 19-20 & 20-21				
	BUDGET SHARE	STDS FUND CAPITAL	COMMUNITY FUNDS	OTHER FUNDS	TOTAL	BUDGET SHARE	STDS FUND CAPITAL	COMMUNITY FUNDS	OTHER FUNDS	TOTAL	BUDGET SHARE	STDS FUND CAPITAL	COMMUNITY FUNDS	OTHER FUNDS	TOTAL
ABBEY INFANT	37,315	0	0	0	37,315	74,047	0	0	0	74,047	36,732	0	0	0	36,732
ABBEY JUNIOR	91,478	0	0	0	91,478	163,012	0	0	0	163,012	71,534	0	0	0	71,534
ALBERT PRITCHARD INF	240,094	0	0	0	240,094	286,569	1,844	0	0	288,413	46,474	1,844	0	0	48,319
ALL SAINTS JR & INF	335,831	0	0	0	335,831	437,872	0	0	0	437,872	102,041	0	0	0	102,041
ANNIE LENNARD	422,146	6,887	0	0	429,033	450,669	13,695	0	0	464,364	28,523	6,808	0	0	35,331
BEARWOOD JR & INF	324,453	24,328	0	0	348,781	583,523	33,355	0	0	616,878	259,070	9,027	0	0	268,097
BLACKHEATH JR & INF	727,075	54,569	0	0	781,644	719,982	32,400	0	0	752,383	(7,093)	(22,169)	0	0	(29,261)
BLEAKHOUSE JUNIOR	186,873	10,380	0	0	197,253	311,259	7,587	0	0	318,846	124,386	(2,793)	0	0	121,593
BRANDHALL JR & INF	143,705	0	0	0	143,705	265,875	0	0	0	265,875	122,169	0	0	0	122,169
BRICKHOUSE JR & INF	(3,640)	0	0	0	(3,640)	44,025	291	0	0	44,316	47,665	291	0	0	47,956
BURNT TREE JR & INF	267,022	25,242	0	0	292,263	385,101	9,866	0	0	394,967	118,080	(15,376)	0	0	102,703
CAPE JR & INF	613,566	59,001	0	0	672,567	822,056	37,737	0	0	859,792	208,489	(21,265)	0	0	187,225
CAUSEWAY GREEN JR & INF	248,282	0	0	0	248,282	394,743	1,117	0	0	395,860	146,461	1,117	0	0	147,578
CHRIST CHURCH JR & INF	213,417	0	113,757	0	327,174	391,250	0	0	0	391,250	177,832	0	(113,757)	0	64,075
CROCKETTS LANE INF	692,274	42,410	0	0	734,684	785,903	42,214	0	0	828,116	93,629	(197)	0	0	93,432
EATON VALLEY	311,744	1,141	0	0	312,885	475,693	6,272	0	0	481,965	163,950	5,131	0	0	169,080
FERNDALE JR & INF	338,703	0	(151,519)	0	187,185	570,114	6,508	(150,659)	0	425,964	231,411	6,508	860	0	238,779
GALTON VALLEY	465,519	32,192	96,270	0	593,980	589,504	41,590	124,312	0	755,405	123,985	9,398	28,042	0	161,425
GLEBEFIELDS JR & INF	80,066	14,129	0	0	94,195	211,937	11,913	0	0	223,850	131,871	(2,216)	0	0	129,655
GRACE MARY JR & INF	206,497	0	0	0	206,497	255,048	0	0	0	255,048	48,551	0	0	0	48,551
GREAT BRIDGE JR & INF	232,140	3,057	0	0	235,198	276,673	0	0	0	276,673	44,533	(3,057)	0	0	41,476
GROVE VALE JR & INF	347,600	6,433	0	0	354,033	468,876	15,147	0	0	484,023	121,277	8,714	0	0	129,990
HANBURY PRIMARY	643,303	15,938	0	0	659,241	824,770	25,106	0	0	849,876	181,467	9,168	0	0	190,635
HALL GREEN JR & INF	826,037	32,087	0	0	858,124	779,022	41,159	0	0	820,180	(47,015)	9,072	0	0	(37,944)
HAMSTEAD INF	77,104	28,267	0	0	105,372	42,433	32,743	0	0	75,175	(34,672)	4,475	0	0	(30,197)
HAMSTEAD JUNIOR	207,480	11,239	0	0	218,720	219,429	17,883	0	0	237,312	11,949	6,644	0	0	18,592
HARGATE JR & INF	549,274	72,764	0	0	622,038	669,793	55,045	0	0	724,837	120,519	(17,719)	0	0	102,799
HARVILLS HAWTHORN PR	285,153	2,411	0	0	287,564	334,215	2,076	0	0	336,291	49,062	(335)	0	0	48,726
HATELEY HEATH PRIM	31,292	14,628	0	0	45,920	333,516	0	0	0	333,516	302,224	(14,628)	0	0	287,596
HIGHFIELDS JR & INF	236,539	35,435	0	0	271,974	367,526	11,227	0	0	378,753	130,987	(24,209)	0	0	106,779
HOLY NAME RC JR & INF	161,803	0	0	0	161,803	193,018	0	0	0	193,018	31,215	0	0	0	31,215
HOLY TRINITY JR & INF	226,536	29,137	0	0	255,674	342,219	0	0	0	342,219	115,682	(29,137)	0	0	86,545
JOSEPH TURNER JR & INF	197,540	0	0	0	197,540	326,245	0	0	0	326,245	128,704	0	0	0	128,704
KING GEORGE V PRIMARY	83,595	0	0	0	83,595	140,314	0	0	0	140,314	56,720	0	0	0	56,720
LANGLEY JR & INF	374,404	0	0	0	374,404	456,433	5,640	0	0	462,073	82,030	5,640	0	0	87,670
LIGHTWOODS JR & INF	167,850	4,581	0	0	172,431	190,009	4,323	0	0	194,331	22,159	(259)	0	0	21,900
LODGE JR & INF	137,203	0	0	0	137,203	262,453	6,788	0	0	269,240	125,250	6,788	0	0	132,037
LYNG JUNIOR & INF	222,990	0	0	0	222,990	271,686	0	47,667	0	319,353	48,696	0	47,667	0	96,363
MOAT FARM INF	297,591	32,726	70,093	0	400,410	493,920	0	187,391	0	681,311	196,329	(32,726)	117,298	0	280,901
MOAT FARM JUNIOR	248,425	0	0	0	248,425	320,743	0	0	0	320,743	72,318	0	0	0	72,318
MOORLANDS JR & INF	173,362	0	0	0	173,362	221,703	0	0	0	221,703	48,342	0	0	0	48,342
NEWTOWN JR & INF	(49,007)	8,838	0	0	(40,169)	0	0	0	0	0	49,007	(8,838)	0	0	40,169
OAKHAM JR & INF	470,430	0	0	0	470,430	469,728	0	0	0	469,728	(701)	0	0	0	(701)
OCKER HILL INFANTS	79,585	7,192	0	0	86,777	136,696	189	0	0	136,885	57,111	(7,003)	0	0	50,108
OLD HILL JR & INF	96,808	1,937	0	0	98,745	135,255	0	0	0	135,255	38,448	(1,937)	0	0	36,511
OLD PARK JR & INF	292,870	14,279	100,273	0	407,421	349,961	23,791	94,738	0	468,490	57,092	9,513	(5,535)	0	61,069
PARK HILL JR & INF	195,971	0	0	0	195,971	172,333	0	0	0	172,333	(23,638)	0	0	0	(23,638)
PENNYHILL	460,231	0	42,738	0	502,969	938,207	0	0	0	938,207	477,976	0	(42,738)	0	435,237
PERRYFIELDS JR & INF	191,479	0	0	0	191,479	222,774	4,000	0	0	226,774	31,294	4,000	0	0	35,294
PRIORY PRIMARY	225,615	0	0	0	225,615	359,776	7,611	0	0	367,387	134,161	7,611	0	0	141,772
REDDAL HILL JR & INF	367,832	0	0	0	367,832	591,450	1,676	0	0	593,126	223,617	1,676	0	0	225,294
ROOD END JR & INF	121,158	2,073	0	0	123,231	277,334	0	0	0	277,334	156,176	(2,073)	0	0	154,103
ROUNDS GREEN JR & INF	18,524	22,389	0	0	40,913	83,674	21,702	0	0	105,376	65,150	(687)	0	0	64,463
ROWLEY HALL JR & INF	67,236	2,025	0	0	69,261	307,218	6,737	0	0	313,955	239,983	4,712	0	0	244,695
RYDERS GREEN JR & INF	370,182	12,875	0	0	383,057	635,158	0	0	0	635,158	264,976	(12,875)	0	0	252,101
SACRED HEART JR & INF	106,267	9,486	0	0	115,753	457,127	0	0	0	457,127	350,860	(9,486)	0	0	341,374
SPRINGFIELD PRIMARY	256,211	25,892	0	0	282,103	378,062	34,954	0	0	413,017	121,851	9,063	0	0	130,914
ST JAMES CE PRIMARY	182,600	24,641	0	0	207,241	349,803	22,343	0	0	372,147	167,203	(2,298)	0	0	164,905
ST JOHN BOSCO JR & INF	115,357	0	321,394	0	436,751	183,886	0	378,525	0	562,411	68,529	0	57,131	0	125,660
ST MARGARETS JR & INF	132,386	0	0	0	132,386	146,612	0	0	0	146,612	14,226	0	0	0	14,226

SCHOOL BALANCES 2019-20 & 2020-21

School	2019-20					2020-21					MOVEMENT BETWEEN 19-20 & 20-21				
	BUDGET SHARE	STDS FUND CAPITAL	COMMUNITY FUNDS	OTHER FUNDS	TOTAL	BUDGET SHARE	STDS FUND CAPITAL	COMMUNITY FUNDS	OTHER FUNDS	TOTAL	BUDGET SHARE	STDS FUND CAPITAL	COMMUNITY FUNDS	OTHER FUNDS	TOTAL
ST MARTINS JR & INF	88,285	6,564	0	0	94,849	151,726	9,565	0	0	161,290	63,440	3,001	0	0	66,441
ST MARY MAG JR & INF	130,536	0	0	0	130,536	191,737	6,527	0	0	198,264	61,201	6,527	0	0	67,728
ST MARY'S JR & INF	156,102	0	0	0	156,102	0	0	0	0	0	(156,102)	0	0	0	(156,102)
ST MATTHEWS JR & INF	461,022	0	0	0	461,022	603,128	0	0	0	603,128	142,106	0	0	0	142,106
TEMPLE MEADOW JR & INF	154,551	0	0	0	154,551	254,526	0	0	0	254,526	99,976	0	0	0	99,976
TIPTON GREEN JUNIOR	282,227	20,777	0	0	303,004	288,229	6,815	0	0	295,044	6,001	(13,961)	0	0	(7,960)
TIVIDALE HALL JR & INF	236,649	2,305	0	0	238,954	312,699	1,730	0	0	314,430	76,050	(575)	0	0	75,475
TIVIDALE COMMUNITY	378,539	0	0	0	378,539	387,377	0	0	0	387,377	8,838	0	0	0	8,838
UPLANDS MANOR PRIMARY	496,481	0	0	0	496,481	741,862	0	0	0	741,862	245,381	0	0	0	245,381
WARLEY INFANTS	31,626	6,358	0	0	37,984	141,766	6,768	0	0	148,534	110,140	410	0	0	110,550
WHITECREST JR & INF	95,511	0	0	0	95,511	131,627	0	0	0	131,627	36,117	0	0	0	36,117
WOOD GREEN JUNIOR	260,265	0	0	0	260,265	361,718	0	0	0	361,718	101,453	0	0	0	101,453
YEW TREE JR & INF	288,231	0	0	0	288,231	378,443	0	0	0	378,443	90,212	0	0	0	90,212
<b>PRIMARY TOTAL</b>	<b>18,431,402</b>	<b>726,614</b>	<b>593,006</b>	<b>0</b>	<b>19,751,022</b>	<b>25,893,072</b>	<b>617,930</b>	<b>681,973</b>	<b>0</b>	<b>27,192,975</b>	<b>7,461,670</b>	<b>(108,684)</b>	<b>88,967</b>	<b>0</b>	<b>7,441,953</b>
HOLLY LODGE HIGH	54,669	1,096	0	0	55,765	75,917	1,499	0	0	77,416	21,249	403	0	0	21,651
PHOENIX	1,432,774	0	0	0	1,432,774	1,270,302	0	0	0	1,270,302	(162,472)	0	0	0	(162,472)
PERRYFIELDS HIGH	125,292	20,590	0	0	145,882	611,880	3,476	0	0	615,356	486,588	(17,114)	0	0	469,474
ST MICHAELS CE HIGH	172,341	0	0	0	172,341	320,724	0	0	0	320,724	148,382	0	0	0	148,382
STUART BATHURST	(103,623)	0	0	0	(103,623)	0	0	0	0	0	103,623	0	0	0	103,623
<b>SECONDARY TOTAL</b>	<b>1,681,452</b>	<b>21,686</b>	<b>0</b>	<b>0</b>	<b>1,703,138</b>	<b>2,278,823</b>	<b>4,975</b>	<b>0</b>	<b>0</b>	<b>2,283,798</b>	<b>597,371</b>	<b>(16,712)</b>	<b>0</b>	<b>0</b>	<b>580,660</b>
MEADOWS	372,141	0	0	0	372,141	588,193	0	0	0	588,193	216,051	0	0	0	216,051
ORCHARD	379,355	79,642	0	0	458,997	346,246	81,188	0	0	427,434	(33,109)	1,546	0	0	(31,563)
WESTMINSTER	696,821	0	0	0	696,821	1,216,800	0	0	0	1,216,800	519,979	0	0	0	519,979
SHENSTONE	325,204	15,732	0	0	340,936	0	0	0	0	0	(325,204)	(15,732)	0	0	(340,936)
<b>SPECIAL TOTAL</b>	<b>1,773,521</b>	<b>95,374</b>	<b>0</b>	<b>0</b>	<b>1,868,895</b>	<b>2,151,239</b>	<b>81,188</b>	<b>0</b>	<b>0</b>	<b>2,232,427</b>	<b>377,718</b>	<b>(14,186)</b>	<b>0</b>	<b>0</b>	<b>363,532</b>
<b>SCHOOLS TOTAL</b>	<b>21,886,375</b>	<b>843,674</b>	<b>593,006</b>	<b>0</b>	<b>23,323,055</b>	<b>30,323,134</b>	<b>704,093</b>	<b>681,973</b>	<b>0</b>	<b>31,709,200</b>	<b>8,436,759</b>	<b>(139,582)</b>	<b>88,967</b>	<b>0</b>	<b>8,386,145</b>

**BUDGET PLANS 2021-22**

School	BUDGET PLANS	
	2021-22	
	£	%
ABBAY INFANT	39,685	2.88
ABBAY JUNIOR	55,776	3.19
ALBERT PRITCHARD INFANT	193,302	13.80
ALL SAINTS CE PRIMARY	356,447	17.20
ANNIE LENNARD PRIMARY	230,153	19.64
BEARWOOD PRIMARY	447,064	19.94
BLACKHEATH PRIMARY	564,236	22.59
BLEAKHOUSE JUNIOR	175,567	8.06
BRANDHALL PRIMARY	100,317	4.40
BRICKHOUSE PRIMARY	5,112	0.43
BURNT TREE PRIMARY	196,990	9.40
CAPE PRIMARY	526,620	16.23
CAUSEWAY GREEN PRIMARY	286,420	12.39
CHRIST CHURCH CE PRIMARY	197,000	8.10
CROCKETTS COMMUNITY PRIMARY	642,115	23.83
EATON VALLEY PRIMARY	228,596	10.30
FERNDALE PRIMARY	417,726	13.74
GALTON VALLEY PRIMARY	336,593	12.51
GLEBEFIELDS PRIMARY	165,402	7.43
GRACE MARY PRIMARY	119,235	7.33
GREAT BRIDGE PRIMARY	205,204	7.73
GROVE VALE PRIMARY	325,894	17.17
HANBURY PRIMARY	265,301	11.12
HALL GREEN PRIMARY	437,194	17.95
HAMSTEAD INFANT	(34,215)	-3.47
HAMSTEAD JUNIOR	187,837	15.67
HARGATE PRIMARY	479,036	16.93
HARVILLS HAWTHORN PRIMARY	246,059	10.76
HIGHFIELDS PRIMARY	177,641	8.49
HOLY NAME CATHOLIC PRIMARY	95,674	9.83
HOLY TRINITY CE PRIMARY	136,573	5.87
JOSEPH TURNER PRIMARY	166,898	7.15
KING GEORGE V PRIMARY	131,254	10.72
LANGLEY PRIMARY	278,362	12.47
LIGHTWOODS PRIMARY	144,676	8.05
LODGE PRIMARY	116,848	5.07
LYNG PRIMARY	176,722	6.86
MOAT FARM INFANT	493,919	25.19
MOAT FARM JUNIOR	392,127	16.06
MOORLANDS PRIMARY	106,195	9.65
OAKHAM PRIMARY	199,328	9.69
OCKER HILL INFANT	36,829	3.28
OLD HILL PRIMARY	71,829	5.96
OLD PARK PRIMARY	327,855	13.96
PARK HILL PRIMARY	81,133	6.83
PENNYHILL PRIMARY	685,148	21.11
PERRYFIELDS PRIMARY	1,315	0.07
PRIORY PRIMARY	334,640	16.32
REDDAL HILL PRIMARY	458,843	21.86

## BUDGET PLANS 2021-22

School	BUDGET PLANS	
	2021-22	
	£	%
ROOD END PRIMARY	7,733	0.30
ROUNDS GREEN PRIMARY	2,304	0.11
ROWLEY HALL PRIMARY	163,038	5.07
RYDERS GREEN PRIMARY	339,761	14.89
SACRED HEART PRIMARY	563,882	25.80
SPRINGFIELD PRIMARY	204,853	8.94
ST JAMES CE PRIMARY	161,945	6.41
ST JOHN BOSCO CATHOLIC PRIMARY	164,554	13.71
ST MARGARETS CE PRIMARY	73,591	7.04
ST MARTINS CE PRIMARY	72,624	5.84
ST MARY MAGDALENE CE PRIMARY	120,046	10.56
ST MATTHEWS CE PRIMARY	577,192	31.14
TEMPLE MEADOW PRIMARY	143,368	7.21
TIPTON GREEN JUNIOR	217,723	11.04
TIVIDALE COMMUNITY PRIMARY	94,062	4.36
TIVIDALE HALL PRIMARY	76,218	3.70
UPLANDS MANOR PRIMARY	578,570	12.67
WHITECREST PRIMARY	102,927	10.21
WOOD GREEN JUNIOR	400,978	24.70
YEW TREE PRIMARY	266,387	8.44
<b>PRIMARY TOTAL</b>	<b>16,342,231</b>	
HOLLY LODGE HIGH	85,456	0.87
PERRYFIELDS HIGH	523,172	7.57
PHOENIX COLLEGIATE	1,272,842	10.33
ST MICHAELS CE HIGH	246,560	3.00
<b>SECONDARY TOTAL</b>	<b>2,128,030</b>	
MEADOWS	257,824	5.69
ORCHARD	46,713	1.35
WESTMINSTER	613,020	11.75
<b>SPECIAL TOTAL</b>	<b>917,557</b>	
PRIMROSE	67,989	388.84
ALBRIGHT	189,996	14.48
SANDWELL COMMUNITY	39	0.08
<b>PRU TOTAL</b>	<b>258,024</b>	
<b>GRAND TOTAL</b>	<b>19,645,842</b>	

## Agenda Item 6

### Schools Forum

14<sup>th</sup> June 2021

### Early Years Block Outturn 2020/21

This report is for information

**1. Recommendations:**

That Schools Forum members:

- 1.1 Note the contents of the report.

**2. Purpose**

- 2.1 To inform members on actual expenditure incurred for the Early Years Block in 2020/21.

**3. Report Details**

- 3.1 The Early Years Block allocation for 2020/21 was £24.540m. The actual grant allocation income received was £24.648m because of an early adjustment; the net effect of which was £0.108m.
- 3.2 Table 1 below details the actual expenditure incurred during 2020/21 regarding the use of the Early Years Block.

**Table 1 – Early Years Block**

<b>Service Area</b>	<b>Budget 2020/21 £,000</b>	<b>Actual Expenditure £,000</b>	<b>Variance £,000</b>
Early Learning 2-year olds	4,227	4,227	0
Early Years - PVI	10,583	11,379	796

Early Years - Schools	8,012	8,006	(7)
EY – Pupil Premium	281	208	(73)
SEN Inclusion Fund	480	480	0
Disability Access Fund	81	10	(71)
Central Services	995	995	0
<b>Total</b>	<b>24,659</b>	<b>25,305</b>	<b>646</b>

3.3 The 2020/2021 final DSG early years funding adjustments that would normally be announced in July, will be delayed because of the new approach taken by the DfE, where local authorities can access the top-up financial support that has been put in place during the 2021 spring term, up to a capped level of 85% of January 2020.

3.4 The final early years funding adjustment should instead be published in November alongside the normal planned schedule to DSG update; The DfE have stated they will endeavour to notify individual local authorities of their final allocation adjustments in September.

#### **4. Recommendations**

That Schools Forum

4.1 Note the contents of the report.

Rosemarie Kerr, Principal Accountant – Schools

Date: 08/06/2021

Contact Officer: Rosemarie Kerr

Tel No: 0121 569 8318



## Agenda Item 7

### Schools Forum

14<sup>th</sup> June 2021

### Central Schools Service Block, centrally retained & De – delegated Budgets Outturn 2020/21

This report is for information

#### 1. Recommendations:

That Schools Forum members:

- 1.1 Note the contents of the report.
- 1.2 Be advised that a further report will be taken to the School Forum meeting on 27<sup>th</sup> September 2021 which will set out the impact of the de-delegated budget expenditure with recommendations on the use of any carry forwards.

#### 2. Purpose

- 2.1 To inform members on actual expenditure incurred for the Central School Services Block, centrally retained and the de-delegated budgets in financial year 2020/21.

#### 3. Report Details

- 3.1 The reports details the actual expenditure incurred during financial year 2020/21 regarding the use of the Central School Services Block and the de-delegated budgets.

**Table 1 – Central School Services Block**

<b>Service Area</b>	<b>Budget 2020/21 £,000</b>	<b>Actual Expenditure £,000</b>	<b>Variance £,000</b>
School Forum	3	0	(3)
Pension Administration	228	228	0

Stat/Regulatory/Education Welfare/Asset Mgt	1,070	1,113	43
Admissions & Appeals	453	453	0
Copyright Licenses*	266	266	0
<b>Total</b>	<b>2,020</b>	<b>2,060</b>	<b>40</b>

\*Copyright Licenses costs are paid for directly by the DfE and the DSG grant allocation paid to the authority is adjusted accordingly.

### Pupil Number Growth Funding

- 3.2 The Pupil number growth allocation agreed by Schools forum was £2.269m. The DfE make an adjustment for pupil number growth funding paid to academies for the period April to August of the previous financial year. The academies adjustment for 2020/21 was £0.551m giving total funding available of £2.820m.

**Table 2 – Pupil Number Growth Funding**

<b>Service Area/budget Description</b>	<b>Budget 2020/21 £,000</b>	<b>Actual Expenditure £,000</b>	<b>Variance – £,000</b>
Pupil number growth	2,820	2,137	(683)

- 3.3 De-delegated Budgets

**Table 3 – De-delegated Budgets**

<b>Service Area</b>	<b>Budget 2020/21 £,000</b>	<b>Actual Expenditure £,000</b>	<b>Variance – £,000</b>
Health & Safety Licenses	27	44	17
Evolve Annual License	6	6	0
Union Facilities Time	196	193	(3)
School Improvement	100	100	0
Schools in financial difficulty	243	206	(37)
<b>Total</b>	<b>572</b>	<b>549</b>	<b>(23)</b>

**4. Recommendations**

That Schools Forum

4.1 Note the contents of the report.

4.2 Be advised that a further report will be taken to the School Forum meeting on 27th September 2021 which will set out the impact of the de-delegated budget expenditure with recommendations on the use of any carry forwards.

Rosemarie Kerr, Principal Accountant – Schools

Date: 08/06/2021

Contact Officer: Rosemarie Kerr

Tel No: 0121 569 8318

## **Agenda Item 8**

### **Schools Forum**

**14th June 2021**

### **SPECIAL EDUCATIONAL NEEDS HIGH NEEDS BLOCK 2020/21 OUTTURN and SPECIAL PROVISION OCCUPANCY**

**This report is for Information**

#### **1. Recommendations:**

That Schools Forum members:

- 1.1 Note the contents of the report in relation to the 2020/21 High Needs Block Grant final outturn

#### **2. Purpose**

- 2.1 To provide schools forum with the High Needs Block (HNB) 2020/21 outturn position.

#### **3. HNB Budget 2020/21 Analysis**

- 3.1 The Final HNB Grant settlement for 2020/21 was £48.131m after deductions for academies recoupment and direct funding of high needs places by Education Skills and Funding Agency.
- 3.2 The carry forward balance on the HNB as at 31 March 2020 was £0.561m deficit.
- 3.3 Table 1 provides a breakdown of the HNB budget of £48.131m; outturn as at 31 March 2021 of £46.973m and the in-year underspend of £1.158m.

**Table 1 - HNB 2020/21 Outturn**

<b>Budget Heading</b>	<b>Budget 2020/21 £000</b>	<b>Actual Outturn 31/3/21 £000</b>	<b>Variance from Budget £000</b>
1) Out of Borough Placements	4,929	5,916	987
2) Pupil Top Up and Place Funding	28,957	29,370	413
3) Post 16 Colleges	2,323	2,653	330
4) Hospital PRU	1,073	1,173	100
5) SEN Support Services	1,412	1,276	(136)
6) Support for Inclusion	4,574	3,803	(771)
7) Alternative Provision	1,911	1,111	(800)
8) SEN Developments	1,123	217	(906)
9) Other SEN Funding	1,677	1,378	(299)
10) Exclusions & Reintegration	152	76	(76)
<b>TOTAL</b>	<b>48,131</b>	<b>46,973</b>	<b>(1,158)</b>

3.4 The main variances are as follows:

- Out of Borough Placements - The overspend is a combination of an increase in the number of pupils placed out of the borough into independent settings and a reduction in pupils placed in other local authority maintained and academy schools.
- Pupil Top up and place funding - The overspend relates to maintained schools and academy mainstream provision, Focus Provisions and Special Schools combined, show an overspend following new in year admissions, new assessments and an

increase in the number of pupils staying on into post 16 placements in mainstream and special schools.

- Alternative Provision – The underspend is as a result of the Alternative Provision Panel’s controlling the number of pupils allocated alternative provision places and has been instrumental in reducing the expenditure throughout the financial year.

3.5 The net carry forward balances for 2020/21 is £0.597m surplus after accounting for the £0.561m deficit from 2019/20.

#### **4. Recommendations**

4.1 That Schools Forum note the contents of the report in relation to the HNB Grant Outturn for 2020/21.

Date: 02/07/2020

Contact Officer: Rose Kerr

**Agenda Item 9****Schools Forum****14 June 2021****SPECIAL EDUCATIONAL NEEDS HIGH NEEDS BLOCK 2021/22  
BUDGET**

<b>This report is for Information</b>
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**1. Recommendations:**

That Schools Forum members:

- 1.1 Note the contents of the report in relation to the 2021/22 HNB Grant Budget.

**2. Purpose**

- 2.1 To provide schools forum with the HNB 2021/22 Budget Information.

**3. HNB Budget 2021/22**

- 3.1 The HNB Provisional Grant for 2021/22 is £53.666m.

**4. HNB 2019/20 Budget Allocations**

- 4.1 Table 1 shows the analysis of the 2021/22 HNB Allocation

**Table 1 - HNB 2021/22 Budget Allocations**

<b>Budget Heading</b>	<b>Budget 2021/22  £000</b>	<b>%</b>
1) Independent Schools	5,102	9.5
2) Other LA maintained and Academy mainstream and Special Schools	1,518	2.8

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3) Pupil Funding delegated to Schools and PRUS and Post 16	35,709	66.5
4) Hospital PRU	1,298	2.4
5) SEN Support Services	1,420	2.7
6) Support for Inclusion	4,642	8.7
7) Alternative Provision	843	1.6
8) SEN Developments	1,250	2.3
9) Other SEN Funding	1,731	3.2
10) Exclusions & Reintegration	152	0.3
<b>Total HNB Grant 2021/22</b>	<b>53,666</b>	

**5. Current known Budget Surplus**

5.1 It is assumed that most expenditure lines will outturn at the anticipated budget as it is too early in the monitoring process to accurately predict any under or over spends. However, within the SEN Developments there is an estimated surplus of £440K and within the Support for inclusion line there is a budget of £199K for Preventing Secondary Exclusions staffing that will not be utilised. This will be removed from the budgeted figures next financial year.

6. The HNB has funded 1158 WTE Specialist Places in Sandwell Provisions across Special Schools, Mainstream Focus Provisions and PRUs.

6.1 Table 2 Shows the places commissioned for the financial year 2021/22. These are whole time equivalents (WTE) where places are commissioned from 1 September 2021.

<b>SPECIAL SCHOOLS</b>		<b>Places</b>
The Orchard		147
The Meadows		185



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The Westminster School		226
Shenstone Lodge and Brades		95
High Point from 1/9/21 WTE		22
Westminster SPI from 1/9/21 WTE		7
Additional places budgeted for in year across all Special Schools for potential over occupancy from 1/9/21 WTE		15
Additional Expansion at the Meadows school from 1/9/21WTE		11
<b>TOTAL</b>		<b>708</b>

<b>FOCUS PROVISIONS</b>		
Primary Schools	ASD	61
	PD	12
	MLD	10
	HI	12
	SEMH	25
	SLCN	5
<b>Primary Total</b>		<b>125</b>

Secondary Schools	ASD	45
	PD	20
	HI	5
<b>Secondary Total</b>		<b>70</b>

<b>TOTAL FOCUS PROVISION PLACES</b>		<b>195</b>
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<b>PRUs</b>		
Primrose PRU (Primary)		25
Sandwell Community School (Secondary)		180
Albright		50
<b>TOTAL PRU PLACES</b>		<b>255</b>

## 7. Recommendations

- 7.1 That Schools Forum note the contents of the report in relation to the HNB Grant Budget 2021/22.

Date: 07/06/2021 Contact Officer: Julie Gill Tel No: 0121-569-8267
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**Schools Forum**

**14<sup>th</sup> June 2021**

**Schools Forum Membership- 2021/22**

**This report is for information**

**1. Recommendations:**

That Schools Forum members:

- 1.1 Note the members that need to be replaced as set out in section 4.2 of this report; in readiness for the new representatives to begin their term of office in September 2021.
- 1.2 Note the requirements on nominating substitute members
- 1.3 That Schools Forum note the attendance of members for meetings for the period July 2020 to March 2021.

**2. Purpose**

- 2.1 The purpose of the report is to provide an update to the report on School Forum Membership presented on 14<sup>th</sup> December 2020. This report provides a list all the members whose extension of their role to 30<sup>th</sup> June 2021 will shortly come to an end.

**3. Links to School Improvement Priorities**

- 3.1 Not appropriate for this report

**4. Report Details**

- 4.1 A report on School Forum Membership was presented on 14<sup>th</sup> December 2020; where it was approved that the current membership of the Forum was to remain in effect until 30 June 2021 as due to a procedural oversight and the exceptional nature of the Covid-19 pandemic; a small number of members of the

Forum had been members in excess of the 4-year term of office as outlined in the Constitution of the Schools Forum.

- 4.2 The following School Forum members need to be replaced by a new representative from their body for them to begin their term of office for the September 2021 meeting:

<b>Representative Body</b>	<b>Name</b>	<b>Date of Appointment</b>
Maintained Primary School member - Governor	Mr B Patel	01/06/2016
Maintained Primary School member - Governor	Mr J Smallman	01/06/2016
Maintained Secondary School Member - Headteacher	Mr P Shone	01/06/2016
Maintained Secondary School member - Governor	Ms C Gallant	01/06/2016
Special School Member	Mr N Toplass	01/06/2016
Trade Union Member	Mr D Barton	01/06/2016
Pupil Referral Unit	Mr K Morgan	03/03/2017

- 4.3 School Member - Headteacher representatives will be elected by the Primary and Secondary Headteacher from maintained schools within the Partnership groups.
- 4.4 School Member - Governor representatives will be elected by the governing bodies of maintained primary, secondary and special schools. (This is co-ordinated by the Association of Sandwell Governing Bodies; ASGB)
- 4.5 The constitution also details the following requirement regarding the nomination of a substitute:

*Each representative group may nominate a named substitute for each of their members. Substitute members must be named on appointment of the substantive member or, where the position of a*

*named substitute becomes vacant in year, as soon as a replacement substitute is identified. The Secretary to the Forum must be notified in writing of the name of a substitute and written confirmation of acceptance issued by the Secretary before a substitute can act.*

4.6 Appendix 1 details members attendance and apologies given for meetings for the period July 2020 to March 2021

**5. Recommendations**

5.1 That Schools Forum note the members that need to be replaced as set out in section 4.2 of this report; in readiness for the new representatives to begin their term of office in September 2021

5.2 That Schools Forum note the requirements on nominating substitute members

5.3 That Schools Forum note the attendance of members for meetings for the period July 2020 to March 2021.

Rose Kerr, Principal Accountant – Children’s Services

Date: 08/06/2021

Contact Officer: Rose Kerr

Agenda Item 10 - Appendix 1

Schools Forum Attendance: July 2020 - March 2021

	Date of Appointment	13th July 2020	28th September 2020	9th November 2020	14th December 2020	18th January 2021	8th March 2021
<b>Primary School Members (8 in total)</b>							
<b>Headteachers (5)</b>							
Ms L Gillam	N/A	Apologies	Apologies				
Ms C Walsh	N/A	Apologies	✓				
Mr G Linford	29/11/2018	✓	✓	✓	✓	✓	✓
Ms S Ramsey	11/11/2019	✓		Apologies			
Mr J Barry	08/11/2020	N/A	N/A	✓	✓	✓	✓
Ms W Lawrence	02/11/2020	N/A	N/A	✓	✓	✓	✓
Ms S Baker	08/11/2020	N/A	N/A	✓	✓	✓	✓
Vacancy/JC							
<b>Governors (3)</b>							
Mr B Patel	01/06/2016	✓		✓			
Mr J Smallman	01/06/2016	✓	Apologies	✓	✓	✓	
Ms L Howard	15/01/2018	Apologies	✓		✓	✓	Apologies
<b>Secondary Schools Members (3)</b>							
<b>Headteachers (1)</b>							
Mr P Shone	01/06/2016	✓	✓	✓	✓	✓	✓
<b>Governors (2)</b>							
Ms C Gallant	01/06/2016	Apologies					
Vacant							
<b>Academies Block Members (4)</b>							
Mr A Burns							
Mr J Topham	03/11/2020	N/A	N/A	✓	✓	✓	Apologies
Mr D Irish - Chair	27/11/2017	✓	✓	Apologies	✓	✓	✓
Mr M Arnall	27/11/2017	✓	✓	✓	✓	✓	✓
Ms L Bray	08/11/2020	N/A	N/A	✓	✓	✓	✓
Ms R Fisher (Substitute Representative)							
<b>Special Schools (1)</b>							
Mr N Toplass - Vice Chair	01/06/2016	✓	✓	✓	✓	✓	✓
<b>Trade Union (1)</b>							
Mr D Barton	01/06/2016	✓	✓	Apologies	✓	✓	Apologies
<b>Early Years (1)</b>							
Mr Z Padda	N/A						
Ms E Pate	01/02/2021						✓
<b>14-19 Provider (1)</b>							
Ms J Bailey	01/09/2019	✓	✓	✓	✓	✓	✓
<b>Pupil Referarral Unit (1)</b>							
Mr K Morgan	03/03/2017	✓	✓	✓	✓	✓	✓
<b>Total Members (20)</b>							
Present		10	10	13	15	15	12
Apologies		4	2	3	0	0	3

Key

No Attendance/No Apologies  
Membership Ceased

**Schools Forum 2021-22**  
**DRAFT - Forward Plan**

**AGENDA ITEM 11**

Meeting Date	Proposed Agenda Items (Core Business)	Reports to be sent to Steve Lilley for approval and Group Head for School Improvement section to be completed	Publish Agenda & Reports on Virtual Office & CMIS & Circulate to Members	Publish Minutes on Virtual Office & CMIS
<b>27th September 2021</b>	School Forum Constitution Review and Update Fair Funding Scheme Updates High Needs Block P3 Monitoring School Funding 2022/23 - Working Group De-delegated Budgets 2020/21 Outturn & Impact Analysis	<b>15th September 2021</b>	<b>20th September 2021</b>	<b>4th October 2021</b>
<b>8th November 2021</b>	SEND Review Arrangements for pupils with SEN Arrangements for use of PRUs and education of children otherwise than at school Arrangements for EY provision 2022/23 School Budget Consultation Proposals High Needs Block P6 Monitoring	<b>27th October 2021</b>	<b>1st November 2021</b>	<b>15th November 2021</b>
<b>13th December 2021</b>	School Budget Consultation Responses and approval of disapplications Confirmation of 2021/22 DSG Allocation Fair Funding Scheme Consultation	<b>1st December 2020</b>	<b>6th December 2021</b>	<b>17th December 2021</b>
<b>17th January 2022</b>	Recommendation of 2022/23 Schools Block Budgets (Jan Proforma) Pupil Number Growth Funding - October census Schools Closedown - Draft Timetable	<b>5th January 2022</b>	<b>10th January 2022</b>	<b>24th January 2022</b>
<b>14th March 2022</b>	School Budgets 2022/23 (including Early Years & High Needs) Fair Funding Scheme Updates High Needs Block P9 Monitoring Forward Plan 2022/23	<b>2nd March 2022</b>	<b>7th March 2022</b>	<b>21st March 2022</b>
<b>20th June 2022</b>	Appointment of Chair & Vice Chair Attendance of Meetings School Balances 2021/22 & Budget Plans 2022/23 High Needs Block Outturn 2021/22 and Budget Plan 2022/23 De-delegated Budgets 2021/22 Outturn & Impact Analysis Fair Funding Scheme Updates Membership Review based on May census S251 - Budgets	<b>8th June 2022</b>	<b>13th June 2022</b>	<b>27th June 2022</b>

**Standing Items (on agenda for every meeting): -**

Membership Updates - Vacancies & Expiry of Office