

## **Meeting of the Dudley Schools Forum**

**Tuesday 25<sup>th</sup> June, 2024 at 6.00pm**

**on Microsoft Teams**

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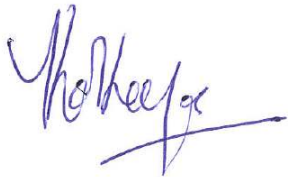
### **Agenda - Public Session**

**(Meeting open to the public and press)**

1. Introductions by the Chair
2. Apologies for absence.
3. To report the appointment of any substitutes for this meeting of the Forum.
4. [To approve as a correct record the minutes of the meeting of the Forum held on 16<sup>th</sup> April, 2024 \(Pages 5 - 14\).](#)
5. Any other matters arising from the Minutes of the meetings of the Forum held on 16<sup>th</sup> April, 2024, not included on the agenda for this meeting.
6. Head Teachers Consultative Forum – Budget Working Group Verbal Feedback
7. [Schools Forum Membership – Spring Election Results \(Pages 15 – 20\)](#)
8. [Proposed agenda and meeting schedule date 2024/25 Academic Year \(Pages 21 – 28\)](#)
9. [Dedicated Schools Grant Outturn and School Reserves 2023/24 \(Pages 29 – 39\)](#)



10. Dedicated Schools Grant – School Specific Contingency Reserves 2023/24 Outturn and 2024/25 Budget (Pages 40 – 43)
11. Delivering Better Value in SEND (Pages 44 – 53)
12. Directorate of Children’s Services Verbal Update



**Chief Executive**

**Dated: 17<sup>th</sup> June, 2024**

**Distribution:**

**Members of Dudley Schools Forum**

**Nursery School Headteacher:** Miss A Ward;

**Primary School Headteachers:** Mrs E Game, Mrs M Harris, Ms L Maskell, Mrs S Parkes;

**Primary School Governors:** Mrs J Belcher (Chair), Mrs J Morgan (Vice-Chair) Mr B Roe and Vacancy;

**Secondary School Headteacher:** Mr T Harris;

**Secondary School Governor:** Mrs S Watson;

**Special School Headteacher:** Vacancy;

**Special School Governor:** Mr P Leyshon;

**Academy Members:** Mrs R Cox, Mr C Finnerty, Mrs J Higgins, Mr I Morton Ms E Stanton, Miss F Sumner, Mr K Tranter, Mrs A Webb and Vacancies;

**Pupil Referral Unit Representative:** Mrs V Howard;

**Non-School Members:** Ms N Fleming, Mr S Morris, Mrs V Turner and Mrs J Williams

## **Non-Voting Attendees**

Councillor D Stanley - Cabinet Member for Children's Services and Education; Councillor Q Mughal - Chair of Children Services Select Committee;

K Graham – Director of Children's Services;

S Thirlway, Service Director of Education, SEND and Family Solutions;

S Powell, Head of SEND and Children's Disabilities Team;

M Palfreyman – Head of Education Outcomes and Inclusion;

C Ludwig – Finance Manager;

J Wilson – Senior Principal Accountant.

## **Please note the following:**

- This meeting will be held virtually by using Microsoft Teams. The meeting will be held live via the Internet link. The meeting will be recorded for future viewing.
- This is a formal meeting and it will assist the conduct of business if participants speak only when invited by the Chair.
- Members of the public are welcome to view the proceedings but should not make contributions at this meeting.
- The Chair reserves the right to adjourn the meeting, as necessary, if there is any disruption or technical issues.
- All participants should mute their microphones and video feed when they are not speaking.
- Please remember to unmute your microphone and switch on your video feed when it is your turn to speak. Speak clearly and slowly into your microphone.
- The Council reserves the right to record meetings. Recording/ reporting is only permitted during the public session of the meeting.

## **Schools Forum Members**

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- Members can submit apologies by contacting Democratic Services. The appointment of any Substitute Member(s) should be notified to Democratic Services at least one hour before the meeting starts.
- The Democratic Services contact officer for this meeting is Gemma Gray, Telephone 01384 815334 or E-mail [gemma.gray@dudley.gov.uk](mailto:gemma.gray@dudley.gov.uk)

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**Minutes of Dudley Schools Forum  
Tuesday, 16<sup>th</sup> April, 2024 at 6.00 pm  
Microsoft Teams**

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**Present:**

Mrs J Belcher (Chair)  
Mrs J Morgan (Vice-Chair)  
Mrs R Cox, Mr C Finnerty, Mrs E Game, Mrs M Harris, Mr P Leyshon, Ms L Maskell, Mrs E O'Brien, Mrs S Parkes, Mr B Roe, Miss F Sumner, Mr K Tranter, Mrs V Turner, Miss A Ward, Mrs S Watson and Mrs A Webb

**Non-Voting Officers:**

C Driscoll (Director of Children's Services), C Ludwig (Finance Manager), M Palfreyman (Head of Education Outcomes and Inclusion), S Powell (Head of SEND and Children's Disabilities Team), S Thirlway (Service Director Education, SEND and Family Solutions), J Wilson (Senior Principal Accountant) and G Gray (Democratic Services Officer).

**Also in Attendance:**

Councillor K Lewis (Chair of Childrens Services Select Committee)

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49 **Introductions by the Chair**

The Chair welcomed everyone to the meeting.

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50 **Apologies for Absence**

Apologies for absence from the meeting were submitted on behalf of Mr S Lanckham, Mrs V Howard and Mrs E Stanton.

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51 **Substitute Members**

There were no substitute Members appointed for this meeting of the Forum.

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52 **Minutes**

**Resolved**

That, the minutes of the meeting held on 27<sup>th</sup> February, 2024 be approved as a correct record and signed.

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53 **Matters Arising from the Minutes**

No issues were raised under this agenda item.

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54 **Head Teachers Consultative Forum – Budget Working Group Verbal Feedback**

Ms L Maskell, Primary School Headteacher Representative, provided feedback on the discussions held at the Head Teachers Consultative Forum – Budget Working Group (HTCF-BWG) meeting. It was reported that discussions had been carried out at the Budget Working Group concerning budget restraints and it had been noted that the extent of the savings needed and the reorganisation of the Local Authority was now in the public domain.

It was reported that the rationalisation plan for the Local Authority Estates would be implemented imminently and that Netherton Arts Centre had been added to the established list of Council properties that would be affected. It had been noted at the Budget Working Group that should any interests received from external education providers in regard to eligible properties would need to be submitted to Children’s Services to ensure it aligned with the Dudley Education Strategic Plan.

The Budget Working Group were advised that there were currently twelve Headteacher vacancies across maintained and Academy schools within the Dudley Borough and that four Headteachers had been appointed, however, it was noted that potentially there could be further resignations to be received towards the end of April.

It was reported that five Office for Standards in Education (Ofsted) inspections had been carried out since the previous meeting in February, 2024 and that a new Ofsted complaints procedure had been established to raise concerns regarding the conduct of inspectors.

It was noted that the Household Support Fund would continue for a further six months and reference was made to the Dudley Community Toothbrush Scheme, the Health Related Behaviour Questionnaire and the Property Proofing project.

It was advised that there continued to be issues within Schools concerning outbreaks of Measles and Covid related cases.

The Budget Working Group were advised that Delivering Better Value (DBV) workshops had been undertaken and that 104 representatives from Primary and Secondary sectors had been in attendance.

It was noted that three schools had expressed an interest in regard to Special Educational Needs and Disability (SEND) bases, however, the Local Authority had advised that there was capacity for additional bases in particular from Secondary settings.

Options for Alternative Provision and Inclusion Strategy Development were being appraised and further information would be shared in due course.

The data regarding exclusion and suspensions were being scrutinised on a monthly basis, however, there had been an indication of a rise in incidents, that would be shared with Headteachers.

It was reported that a number of Schools were being converted to Academy status, which included: Thorns Primary School, Withymoor Primary School, Gig Mill Primary School, Newfield Park Primary School, Hawbush Primary School as well as continued preparations for Coseley Free School. It was further advised that a new site had been identified for Eton Star Dudley with a projected opening date in 2026.

## **Resolved**

That the feedback provided be noted.

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## 55 **Schools Forum Membership – Verbal Update**

The Democratic Services Officer provided a verbal update and referred to the change of representation for Primary School Representative in that Mrs E Game had replaced Mrs A Hannaway following her resignation and would continue in the term of office until 31<sup>st</sup> October, 2026. Reference was also made regarding the Spring Election process.

In response to a query from Mrs E O'Brien, Non School Member Representative, regarding when her term of office expired, the Democratic Services Officer advised that a response would be provided in writing in due course.

### **Resolved**

That the verbal update on the Schools Forum Membership, be noted.

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## 56 **Dedicated Schools Grant Budget Process 2024/25 – Final Update**

A report of the Director of Children's Services was submitted to provide the Forum with a final update in respect of the Dedicated Schools Grant (DSG) budget planning process for 2024/25 and to carry out the annual consultation on financial issues, as required by the Schools Forum (England) (Coronavirus) (Amendment) Regulations 2020 as amended by the School and Early Years Finance (England) Regulations 2021.

The Finance Manager presented the report in detail, and in doing so, referred Representatives to Table 1 of the report submitted, which outlined the current total provisional DSG for 2024/25. It was noted that there had been a slight increase within the Early Years funding block, together with an adjustment within the High Needs Block, which related to recoupment and direct provision by Academies.

The Finance Manager referred Representatives to various paragraphs in the report submitted, which outlined in detail information concerning funding for High Needs, SEND Services, alternative provision, and Early Years funding.



Reference was made to a number of revenue grants as set out in the report submitted, in particular the Pupil Premium being the most significant grant that would be distributed to schools. The Finance Manager reported that the rates of the Pupil Premium would increase from 1.5% to 1.7% for 2024/25 and that the funding would continue to be based on the October census.

It was noted that the Physical Education and Sports Grant would continue for 2023/24 and would remain for the 2024/25 academic year. The Universal Infant Free School Meal Grant had increased for the 2023/24 academic year to £2.53 per meal, however, it was anticipated that the funding rate per meal for 2024/25 would be announced in June, 2024 by the Department for Education (DfE).

It was advised that the Teachers Pay Grants and Teachers Pension Grants from 2018 and 2019, together with the supplementary grant and the mainstream schools additional grant was now accumulated within the main funding formula allocation.

Representatives were referred to the Household Support Fund as set out in the report submitted and the Finance Manager reported that the Chancellors Budget from March, 2024 would provide Local Authorities with an extension of funding for the first six months of 2024/25 and that holiday vouchers for free school meal children would continue.

The Finance Manager reported that the Hardship Fund and the Holiday Activity Fund would continue for 2024/25 and the Recovery Premium Funding grant would continue throughout 2023/24. It was advised that all current funding for the National Tutoring Programme (NTP) would need to be spent by the end of the 2023/24 academic year in view of the programme being ceased by the end of the year.

Funding would be provided for two additional grants for the 2024/25 academic year, which included the Teachers Pay Additional Grant, which supported schools with the Teachers Pay awards and the Teachers Pension Employer Contribution Grant, which compensated schools for the increase in employers contributions to teachers pension costs.

The Finance Manager further outlined the information as detailed in the report submitted regarding the Basic Need Capital Grant, the School Building Condition Allocations and the Capital Funding to Support SEND.

In response to a query raised by Mrs R Cox, Academy Member Representative regarding the band funding matrix and whether the funding would be reviewed to tie in with the rise in costs, the Finance Manager advised that the Local Authority were conscious that the matrix band funding had not increased and that the average cost of an Education Health Care Plan (EHCP) had risen, however, it was advised that this would be reviewed regularly.

The Head of SEND and Children's Disabilities Team further explained that the matrix funding would be included within the work undertaken on the Delivering Better Value for SEND together with the relationship this had to the Sufficiency Strategy.

In response to a comment raised by Mrs S Parkes, Primary School Headteacher Representative regarding the review of Notional SEND, the Finance Manager commented that the figure for Notional SEND was set by the DfE, however, the Local Authority were conscious of the issues and were continuing to undertake discussions with the DfE regarding the Notional SEND figures.

### **Resolved**

- (1) That the updated information in respect of the Dedicated Schools Grant and the annual consultation on financial issues for the 2024/25 financial year, be noted; and
- (2) That the information reported on that there had been no request to transfer budgets between the funding blocks for 2024/25, be noted.

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## **57 Dedicated Schools Grant Projected Outturn Update 2023/24**

A report of the Director of Children's Services was submitted on the latest financial forecast in respect of the Schools Budget for the 2023/24 financial year ending 31<sup>st</sup> March, 2024.

The Senior Principal Accountant presented the report and in doing so, advised that the current allocation of the Dedicated Schools Grant (DSG) was currently £319.443m, which included £2.412m business rate allocation and it was noted that going forward business rates would be centralised, therefore, funding would no longer be received directly through the DSG and would be provided through a separate funding stream administered by the DfE for schools.

It was reported that the business rate included £145.360m allocated to Academy Schools, which the Local Authority would not receive and that the remaining balance of £171.167m was reflected within the various funding streams. It was advised that £53.169m of the funding related to the Central Block, which included the High Needs Block deficit position of £4.646m and that funding of £118.267m would be received for mainstream primary and secondary schools maintained by the Local Authority together with nursery education.

The Senior Principal Accountant stated that the centrally retained budget reflected funding of £0.76m for 76 places for Cherry Tree Home and Hospital Pupil Referral Unit, and that £1.064 had been received in regard to the post 16 funding for Old Swinford Hospital School which would be paid by a grant directly to Old Swinford Hospital School.

It was anticipated that there would be an overspend of £7.449m in regard to the High Needs Block, however, it was noted the amount included £4.646m from the budget reserves. It was noted that as a result of top up placements and EHCP's there had been a slight increase regarding the Outturn that had been presented at a previous meeting of the Schools Forum.

It was reported that the Central Schools Service block evidenced an overspend of £0.402m as a result of pressures from outer Borough placements; that there was a saving of £0.037 regarding the Early Years Block, and that there would be an overspend of £23.317m concerning Reserve Transfers, which reflected the deficit position of the High Needs Block from 2022/23.

The Senior Principal Accountant referred Representatives to Appendix A and B of the report submitted, which outlined in detail any overspend within each budget area. In referring to Appendix A, it was advised that there would be a saving of £0.037m in relation to the Early Years Block; that there would be an overspend of £3.223m in regard to Centrally retained budgets and that there would be a £27.963m historic deficit from the High Needs Block, which included £4m being used from budget reserves.

In referring to Appendix B the Senior Principal Accountant outlined the estimated reserves for the end of the financial year and in doing so advised that £246.386m had been paid to schools from the Schools Block; that there would be an overspend of £34.125m in regard to the High Needs Block; that there would be a reserve amount of £3.026m regarding the Early Years Block and that it was anticipated that there would be a reserve of £0.050m within the Central School Services Block.

## Resolved

That the 2023/24 forecast outturn position as at 31<sup>st</sup> January, 2024 in respect of the centrally retained areas of the Schools Budget, which was funded by the Dedicated Schools Grant, be noted.

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### 58 **School and Early Years Finance and Childcare (England) Regulations 2024**

A report of the Director of Children's Services was submitted in respect of the latest amendments to the School and Early Years Finance and Childcare (England) Regulations 2024 as advised by Central Government.

The Senior Principal Accountant presented the report and referred Members to the Lower Prior Attainment Factor that would be used within the National Funding Formula (NFF). It was reported that historically Local Authorities were required to use 2019 assessment data for the Low Prior attainment funding in view of the Covid-19 pandemic, however, assessment data was now available from 2022 to be used within the NFF calculations for 2024/25.

In regard to the Growth and Falling Rolls Funding, it was advised that it had been agreed with Local Authorities to provide funding to Schools or Academies that would provide extra classes in order to meet basic needs within the area. It was noted that the operation of Falling Rolls Funding would be at the discretion of the Local Authorities for 2024/25.

Representatives were referred to new funding available in regard to Early Years Funding and that the programme would now be extended to two-year-old children and children aged from 9 months old.

It was noted that the Social Deprivation for Early Years continued to maintain the mandatory social deprivation supplement in respect of three- and four-year-old children, and that this would be optional for disadvantaged two-year-old children. It was advised that the funding available within the budgets had increased to £91,000.

It was advised that the Early Years Pupil Premium (EYPP) regulations had been extended to all children that were eligible for new Free Early Years Entitlement (FEYE); that there was a requirement to pay £0.68p per hour per child funding rate and that the Local Authority would match the funding rate.

The Disability Access Fund eligibility had been extended to two-year-old and 9-month-old children and that there was a requirement to pay £910 funding rate. It was noted that the Local Authority would match the funding rate for the Disability Access Fund.

It was reported that the Early Years 95% pass through Requirement rate had now been extended to include two-year-old children and children over the age of nine months and that the Local Authority were estimated to be paying 97.5% for three to four year old children, 98.68% for two year old children and 100% for under two year old children and that the 12% Early Years Discretionary Funding Cap had been increased within 2023/24 and would continue to be paid within 2024/25.

It was advised that the current Local Authority Funding Rates: Two-year-olds would be calculated using the methodology operated to fund Local Authorities for delivering the disadvantaged two-year-old entitlement. It was stated that a separate single funding formula would be in place for children aged two and under and that the Special Educational Needs Inclusion Fund would provide the same allocation of £120,000.

The Senior Principal Accountant reported that data collection for the Early Years Census had been altered to reduce administrative burdens for Early Years Childcare providers.

In response to a query raised by Mrs R Cox, Academy Member Representative regarding the analysis for Falling Rolls Funding to consider how many schools might be eligible for the funding, the Senior Principal Accountant advised that the allocation of funding would be dependent on the criteria and would be allocated through the falling roles projection. It was noted that although the Local Authority had not been required previously, the funding could be looked into going forward to be included within the formula.

The Finance Manager commented that further consultation and consideration would need to be given regarding the funding, however, it was considered that should a Falling Rolls Fund be established for several schools, the amount would be minimal.

## **Resolved**

That the amendments to the School and Early Years Finance (England) Regulations 2024 as advised by central government, be noted.

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59 **Directorate of Children's Services – Verbal Update**

The Director of Children's Services referred to the Council's budgets and commented that the finance team were working towards closing the accounts for the end of the financial year. It was noted that there would be a considerable overspend for 2023/24, which would go into the low level of the Council's budget reserves and the priority would be to continue to work on identifying savings or to increase income across the Council.

It was advised that there was a legal balanced budget that had been set for the financial year, however, there were continued increase in pressures and many challenges across Children Services and Adult Services who were experiencing a growth in demand.

In regard to the £34m High Needs Block cumulative deficit, it was noted that there was a DfE statutory override in place, therefore, the Council would not need to include the amount within the balance sheet, however, it was advised that the DfE override was expected to end by the end of March, 2026, which would have a significant impact on the Council's financial status.

The Director of Children's Services referred to the imminent Local Elections together with the Police and Crime Commissioner and the Mayor for the Combined Authority, which was due to take place on 2<sup>nd</sup> May, 2024.

It was reported that Councillor R Buttery, Cabinet Member for Children's Services would be stepping down after the Elections in May and the Director of Children's Services together with the Chair expressed their appreciation for the continued support that she had provided to the Dudley Schools Forum and to the Children's Services Directorate.

**Resolved**

That the verbal update on the Directorate of Children's Services, be noted.

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The meeting ended at 6.45pm

CHAIR

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## **Dudley Schools Forum – 25<sup>th</sup> June, 2024**

### **Report of the Director of Children’s Services**

#### **Schools Forum Membership**

##### **Purpose**

1. To provide Schools Forum with an update in respect of Schools Forum membership changes effective from 1<sup>st</sup> May, 2024.

##### **Schools Forum Role and Responsibilities**

2. Schools Forum is responsible for ensuring that the constitution and membership meet the legislative requirements detailed in the School Forum (England) Regulations 2012, which were effective from 1 October 2012, as amended by Regulation 3 of the School and Early Years Finance (England) Regulations 2015.

##### **Recommendation**

3. That the updated position in respect of the membership of Dudley’s Schools Forum effective from 1<sup>st</sup> May, 2024, be noted.

##### **Background**

4. Dudley’s current Schools Forum Constitution allows for 28 members; comprising of 14 School members, 10 Academy School members and 4 Non-schools members.
5. Governor Support team commenced an election process seeking nominations for two primary school governor representative, one special school governor representative, three Academy representatives and two non-school member, the outcomes of which are detailed below:

### School Member – Primary School Governor

6. Following one nomination Mrs J Morgan (Dawley Brook Primary School) will continue in post as Primary School Governor Representative for a three year term of office to 30<sup>th</sup> April 2027.

No further nominations have been received and one vacant post will remain.

### Special School Governor

7. Following one nomination Mr P Leyshon (Pensmeadow and Rosewood School) will continue in post as Special School Governor Representative for a three year term of office to 30<sup>th</sup> April 2027.

### Academy Member

8. Following one nomination Mr I Morton (Windsor Academy Trust) has been appointed for a three year term of office to 30<sup>th</sup> April 2027.

No further nominations have been received and two vacant posts will remain.

### Non School Member – Unions and Professional Associations

9. Following two nominations Mr S Morris, Director of Education has been appointed as the Worcester Diocesan Board of Education representative for a three year term of office to 30<sup>th</sup> April, 2027 and Ms N Fleming, Daisychain Day Nursery has been appointed as the Early Years Representative for a three year term of office to 30<sup>th</sup> April, 2027.

### **Budget Working Group**

10. This report has been considered by the Budget Working Group on 18<sup>th</sup> June, 2024.



## **Finance**

11. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2018.

## **Law**

12. The Schools Forum is a statutory decision making and consultative body constituted in line with the School Standards and Framework Act 1998, and its associated regulations, including the Schools Forums (England) Regulations 2012, to enable members of the local school community to work in partnership with Dudley Metropolitan Borough Council when making decisions about school funding and finances.
13. Schools Forums are regulated by the Schools Forums (England) Regulations 2012 as amended.

## **Risk Management**

14. There are no implications to the Council's Risk Management Framework that result from the proposals contained within this report.

## **Equality Impact**

15. The Council's Equal Opportunities Policy is taken into account when considering the allocation of resources.

## **Human Resources/Organisational Development**

16. This report has no direct implications for organisational development, human resources or service transformation.

## **Commercial/Procurement**

17. There is no impact on the potential to commercially trade and no impact on our customer base.

## **Council Plan**

18. The Dudley Council Plan 2019-2022 is clear in its ambitions for educational outcomes including raising skills, educational and work potential, increasing good or better schools and closing the gap for disadvantaged pupils. The role of Dudley Schools Forum is to advise the Council on matters affecting schools funding, principally the allocation of the Dedicated Schools Grant (DSG), and the local Fair Funding Formula which distributes budgets to schools, early years providers and other maintained education settings.

*Catherine Driscoll*

**Catherine Driscoll**  
**Director of Children's Services**

### **Report Author:**

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## **Appendices**

Appendix 1 – School Forum Membership from 1<sup>st</sup> May, 2024

		Headteachers 3 year term of office					
<u>DUDLEY SCHOOLS FORUM CONSTITUTION</u>		1 May 2022 to 30 April 2025	1 May 2023 to 30 April 2026	1 May 2024 to 30 April 2027	1 November 2021 to 31 October 2024	1 November 2022 to 31 October 2025	1 November 2023 to 31 October 2026
<b>SCHOOL MEMBERS</b>							
<b>Nursery School Headteachers</b>	<b>One nursery headteacher</b>						
<b>Netherton Park Nursery</b>	Miss A Ward, Netherton Park Nursery School, Netherton, Dudley DY2 9QF					√	
<b>Primary School Headteachers</b>	<b>Four primary school headteachers from any of the five townships</b>						
Brierley Hill	Ms Lisa Maskell, Dawley Brook Primary School, Dubarry Avenue, Valley Fields, Kingswinford, West Midlands, DY6 9BP					√	
Halesowen	Mrs Marcia Harris, Cradley CofE Primary School, Church Road, Cradley, Halesowen, West Midlands, B63 2UL				√		
North Dudley	Mrs S Parkes, Wren's Nest Primary School, Marigold Crescent, Dudley, DY1 3NX					√	
Stourbridge	Mrs E Game, Headteacher, Oldswinford CofE Primary School, Field Lane, Oldswinford, Stourbridge, DY8 2JQ						√
<b>Primary School Governors</b>	<b>Four primary school governors from any of the five townships</b>						
Brierley Hill	Mr B Roe, Crestwood Park Primary School, Lapwood Avenue, Crestwood Park Estate, Kingswinford, DY6 8RP.	√					
Dudley	<b>Vacancy</b>			√			
Stourbridge	Mrs J Belcher, Peters Hill Primary School, Peters Hill Road, Amblecote, Brierley Hill, West Midlands, DY5 2QH		√				
Brierley Hill	Mrs J Morgan, Dawley Brook Primary School, Dubarry Avenue, Valley Fields, Kingswinford, West Midlands, DY6 9BP			√			
<b>Secondary School Headteachers</b>	<b>One secondary school headteacher from any of the five townships</b>						
Brierley Hill	Mr T Harris, Headteacher, Summerhill School, Lodge Lane, Kingswinford, West Midlands, DY6 9XE					√	
<b>Secondary School Governors</b>	<b>One secondary school governor from any of the five townships</b>						
Brierley Hill	Mrs S Watson, Summerhill School, Lodge Lane, Kingswinford, West Midlands, DY6 9XE		√				
<b>Special School Headteacher</b>	<b>One special school headteacher for all townships</b>						
All townships	<b>Vacancy</b>				√		
<b>Special School Governor</b>	<b>One special school governor for all townships</b>						
All townships	Mr P Leyshon - Pensmeadow & Rosewood School			√			
<b>ACADEMY MEMBER</b>							

	<b><u>DUDLEY SCHOOLS FORUM CONSTITUTION</u></b>	<b>1 May 2022 to 30 April 2025</b>	<b>1 May 2023 to 30 April 2026</b>	<b>1 May 2024 to 30 April 2027</b>	<b>1 November 2021 to 31 October 2024</b>	<b>1 November 2022 to 31 October 2025</b>	<b>1 November 2023 to 31 October 2026</b>
1 Representative	Mr C Finnerty (DRB Ignite Multi-Academy Trust)		√				
1 Representative	Ms J Higgins, Chief Executive (Dudley Academy Trust)		√				
1 Representative	Mr K Tranter, Chief Operating Officer (Dudley Academy Trust)		√				
1 Representative	Miss F Sumner, Senior Operations Manager (St John Bosco Catholic MAC)	√					
1 Representative	Mrs R Cox, Chief Executive Officer (Hales Valley Academy Trust)		√				
1 Representative	Ms E Stanton, Director of Invictus Institute (Invictus Education Trust)		√				
1 Representative	<b>Vacancy</b>			√			
1 Representative	<b>Vacancy</b>			√			
1 Representative	Mr I Morton, Head Teacher, Kingswinford Academy (Windsor Academy Trust)			√			
1 Representative	Mrs A Webb (Windsor Academy Trust)		√				
<b><u>Pupil Referral Units</u></b>							
<b>All PRUs</b>	Mrs V Howard, Headteacher, Cherry Tree Learning Centre (PRU)				√		
<b><u>NON SCHOOL MEMBERS</u></b>							
<b><u>Representatives from Bodies Approved By Schools Forum</u></b>							
Unions and Professional Associations, nominated by the staff side of the Directorate Joint Consultative Committee	Mrs Victoria Turner, National Educational Union (NEU)	√					
Worcester Diocesan Board of Education, nominated by the Board	Mr S Morris, Deputy Director of Education			√			
Early Years Provider Reference Group, nominated by the Group	Ms N Fleming, Daisychain Day Nursery			√			
Dudley 16-19 FE Providers	Mrs J Williams, Interim Principal and CEO, Halesowen College		√				

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**Dudley Schools Forum – 25<sup>th</sup> June, 2024**

**Report of the Director of Children’s Services**

**Schools Forum Proposed Meetings and Forward Plan for the 2024/25 Academic Year**

**Purpose**

1. To provide Schools Forum with a schedule of proposed meeting dates and Forward Plan for the 2024/25 academic year.

**Schools Forum Role and Responsibilities**

2. The current Schools Forums (England) Regulations 2012 state that a Schools Forum must meet at least four times a year and are quorate if at least two fifths of the total appointed membership is present at a meeting.

**Recommendation**

3. Schools Forum to consider the schedule of meetings proposed for 2024/25 academic year in Table 1 together with the proposed Forward Plan attached at Appendix A and to advise the Director of Children’s Services if any variations are required.

**Background**

4. The June meeting is the last scheduled meeting of the Forum for the 2023/24 academic year.
5. Whilst the Schools Forum Regulations state that a Schools Forum must meet at least four times a year, the Dudley Schools Forum normally meets six times a year and more frequently if there are strategic funding decisions to be made.

6. The proposed meetings will be held remotely with the option of a physical meeting if deemed necessary by the Forum or the Local Authority and will commence at 6pm, as outlined in Table 1 below.
7. Table 1 – Proposed Schools Forum Meetings for 2024/25 Academic Year

<b>Schools Forum Meeting</b>	<b>Venue</b>
1 <sup>st</sup> October 2024	Microsoft Teams
12 <sup>th</sup> November 2024	Microsoft Teams
14 <sup>th</sup> January 2025	Microsoft Teams
4 <sup>th</sup> March, 2025	Microsoft Teams
1 <sup>st</sup> April, 2025	Microsoft Teams
24 <sup>th</sup> June, 2025	Microsoft Teams

8. Appendix A includes details of the proposed Forward Plan agenda items at this time, together with meeting dates for Head Teachers Consultative Forum – Budget Working Group for the 2024/25 academic year.

#### Schools Forum Training

9. A workshop to provide Schools Forum training will be arranged for September 2024 to provide further information regarding the roles and responsibilities of Schools Forum along with an update on latest information released from the Department for Education. Invitations will be issued to all members.

#### Budget Working Group

10. This report will be considered by the Budget Working Group on 18<sup>th</sup> June, 2024.

### **Finance**

11. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2018.
12. From 1 April 2006, the Schools Budget has been funded by a direct grant: Dedicated School Grant (DSG).

## **Law**

13. The Schools Forum is a statutory decision making and consultative body constituted in line with the School Standards and Framework Act 1998, and its associated regulations, including the Schools Forum (England) Regulations 2012, to enable members of the local school community to work in partnership with Dudley Metropolitan Borough Council when making decisions about school funding and finances.
14. Schools Forums are regulated by the Schools Forums (England) Regulations 2012 as amended.

## **Risk Management**

15. There are no implications to the Council's Risk Management Framework that result from the proposals contained within this report.

## **Equality Impact**

16. The Council's Equal Opportunities Policy is taken into account when considering the allocation of resources.

## **Human Resources/Organisational Development**

17. This report has no direct implications for organisational development, human resources or service transformation.

## **Commercial/Procurement**

18. There is no impact on the potential to commercially trade and no impact on our customer base.

## **Council Plan**

19. The Dudley Council Plan 2019-2022 is clear in its ambitions for educational outcomes including raising skills, educational and work potential, increasing good or better schools and closing the gap for disadvantaged pupils. The role of Dudley Schools Forum is to advise the Council on matters affecting schools funding, principally the allocation of the Dedicated Schools Grant (DSG), and the local Fair Funding Formula which distributes budgets to schools, early years providers and other maintained education settings.

*Catherine Driscoll*

**Catherine Driscoll**  
**Director of Children's Services**

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**Appendices**

Appendix 1 – Proposed Meetings and Forward Plan for the 2024/25  
Academic Year



**DRAFT SCHOOLS FORUM – MEETING SCHEDULE 2024/25**

<b>Date of meeting (Venue)</b>	<b>Items to be considered</b>		
<p><b>Tuesday 1<sup>st</sup> October, 2024</b></p>	<ul style="list-style-type: none"> <li>• Election of Chair for the 2024/25 Academic Year (Democratic Services)</li> <li>• Appointment of Vice-Chair for the 2024/25 Academic Year</li> <li>• Head Teachers Consultative Forum – Budget Working Group Verbal Feedback</li> <li>• SF Membership Update – Headteachers elections (Lead Officer/Democratic Services)</li> <li>• Growth Fund Methodology 2025/26 (Accountancy)</li> <li>• Trade Union Facility Time – Pooled Funding Arrangement (Rob Marsh)</li> <li>• Delivering Better Value in SEND (Martyn Palfreyman / Accountancy / Salahdin Thirlway/ Susan Powell)</li> <li>• Directorate of Children’s Services Verbal Update</li> </ul>	<p>Microsoft Teams</p>	<p>6pm</p>
<p><b>Tuesday 12<sup>th</sup> November, 2024</b></p>	<ul style="list-style-type: none"> <li>• Head Teachers Consultative Forum – Budget Working Group Verbal Feedback</li> <li>• SF membership Headteachers elections result (Lead Officer/Democratic Services)</li> <li>• Dedicated Schools Grant Projected Outturn Update 2024/25 (Accountancy)</li> <li>• Dedicated Schools Grant – Schools Specific Contingency Reserves (Martyn Palfreyman)</li> <li>• De-delegated Service Options for 2025/26 (Accountancy)</li> <li>• Dudley’s Scheme for Financing Schools 2024/25(Accountancy)</li> <li>• Delivering Better Value in SEND (Martyn Palfreyman / Accountancy / Salahdin Thirlway/ Susan Powell)</li> <li>• Directorate of Children’s Services Verbal Update</li> </ul>	<p>Microsoft Teams</p>	<p>6pm</p>

<b>Tuesday 14<sup>th</sup> January, 2025</b>	<ul style="list-style-type: none"> <li>• Head Teachers Consultative Forum – Budget Working Group Verbal Feedback</li> <li>• SF membership update (if required) (Lead Officer/Democratic Services)</li> <li>• Dedicated School Grant Budget Process 2025/26 (Accountancy)</li> <li>• Pupil Growth Fund 2024/25 and 2025/26 (Accountancy)</li> <li>• Delivering Better Value in SEND (Martyn Palfreyman / Accountancy / Salahdin Thirlway / Susan Powell)</li> <li>• Directorate of Children’s Services Verbal Update</li> </ul>	Microsoft Teams	6pm
<b>Tuesday 4<sup>th</sup> March, 2025</b>	<ul style="list-style-type: none"> <li>• Head Teachers Consultative Forum – Budget Working Group Verbal Feedback</li> <li>• SF membership update – Spring Elections Process (Lead Officer/Democratic Services)</li> <li>• Early Years Single Funding Formula and Early Years Inclusion Funding Arrangements and Proposed Changes for 2025/26 (Donna Farnell)</li> <li>• Dedicated Schools Grant Stage 2 Budget Planning – Centrally Retained Service Approvals 2025/26 (Accountancy)</li> <li>• Delivering Better Value in SEND (Martyn Palfreyman / Accountancy / Salahdin Thirlway / Susan Powell)</li> <li>• Directorate of Children’s Services Verbal Update</li> </ul>	Microsoft Teams	6pm
<b>Tuesday 1<sup>st</sup> April, 2025</b>	<ul style="list-style-type: none"> <li>• Head Teachers Consultative Forum – Budget Working Group Verbal Feedback</li> <li>• SF membership update – Spring Elections results verbal update (Lead Officer/Democratic Services)</li> <li>• Dedicated Schools Grant Budget Process 2025/26 – Final Update (Accountancy)</li> <li>• Dedicated Schools Grant Projected Outturn Update 2024/25 (Accountancy)</li> <li>• School and Early Years Finance (England) Regulations 2025 (Accountancy)</li> <li>• Directorate of Children’s Services Verbal Update</li> </ul>	Microsoft Teams	6pm

<p><b>Tuesday 24<sup>th</sup> June, 2025</b></p>	<ul style="list-style-type: none"> <li>• Head Teachers Consultative Forum – Budget Working Group Verbal Feedback</li> <li>• SF Membership Spring Elections Results (Lead Officer/Democratic Services)</li> <li>• Proposed agenda and meeting schedule date 2025/26 Academic Year (Lead Officer/Democratic Services)</li> <li>• Dedicated Schools Grant outturn 2024/25 to include school reserves and licensed deficits (Accountancy)</li> <li>• Dedicated Schools Grant – School Specific Contingency Reserves 2024/25 and 2025/26 (Martyn Palfreyman)</li> <li>• Delivering Better Value in SEND (Martyn Palfreyman / Accountancy / Salahdin Thirlway / Susan Powell)</li> <li>• Directorate of Childrens Services Verbal Update</li> </ul>	<p>Microsoft Teams</p>	<p>6pm</p>
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### HTCF-BWG MEETING SCHEDULE 2024/25 ACADEMIC YEAR

<b>HTCF-BWG Meeting (Representative Head teachers)</b>	<b>Time</b>	<b>Venue</b>
24 <sup>th</sup> September, 2024	8.30 – 10.30	MS Teams
5 <sup>th</sup> November, 2024	8.30 – 10.30	MS Teams
7 <sup>th</sup> January, 2025	8.30 – 10.30	MS Teams
25 <sup>th</sup> February, 2025	8.30 – 10.30	MS Teams
25 <sup>th</sup> March, 2025	8.30 – 10.30	MS Teams
17 <sup>th</sup> June, 2025	8.30 – 10.30	MS Teams

## **Schools Forum 25<sup>th</sup> June, 2024**

### **Report of the Director of Children's Services**

### **Dedicated Schools Grant Outturn and School Reserves 2023/24**

#### **Purpose of Report**

1. To provide Schools Forum with financial data in respect of the Schools Budget funded by the Dedicated Schools Grant (DSG) for the 2023/24 financial year ended 31 March 2024.

#### **Schools Forum Role and Responsibilities**

2. The Forum is the 'guardian' of the local Schools Budget, and its distribution among schools and other bodies, and therefore must be closely involved throughout the development process.

#### **Recommendation**

3. To note the 2023/24 DSG Outturn and DSG Accumulated Reserve which are detailed at Appendix A and Appendix B of this report.
4. Schools Forum to note the 2023/24 financial outturn in respect of the reserves for Dudley maintained schools.

#### **Background**

5. The Dedicated Schools Grant (DSG) is a DfE ring fenced grant which funds the Schools Budget. The Schools Budget is a combination of centrally retained budgets from the Central School Services Block, Early Years Block and High Needs Block of the DSG together with the ISB (Individual Schools Budget).
6. The DSG can only be applied to meet expenditure properly included in the Schools Budget, as defined by the School and Early Years

## Finance (England) Regulations 2023.

7. At outturn stage, the Local Authority is required to append an additional note to the Statement of Accounts confirming the deployment of the DSG in support of the Schools Budget, as required by the Accounts and Audit (Amendment) (England) Regulations 2015. The Chief Finance Officer is also required to confirm final deployment of the DSG in support of the Schools Budget in connection with the Section 251 Outturn form.
8. The annual audit in respect of 2023/24 will commence in July 2024.

### **DSG Outturn for 2023/24**

9. For the 2023/24 financial year the DSG was £319.439m. Of this allocation £145.978m was payable by the Education and Skills Funding Agency directly to Dudley's 53 Primary and Secondary Academy Schools giving Dudley a net DSG of £173.461m. Business rates for both maintained and academy schools are included within this at a total of £2.412m, as the local authority adopted the new approach to accounting for business rates within the DSG.
10. From December 2019 Cherry Tree Home & Hospital provision converted to academy status. Place funding for 76 places is recouped directly from High Needs Block, with Hospital Expenditure commissioned directly by the Local Authority and paid monthly.
11. Dudley's net DSG of £173.461m was allocated:
  - a. Centrally retained budget areas £53.165m, assuming an in year deficit of £4.646m would be carried forward via the DSG Adjustment Account.
  - b. De delegated budget of £0.235m
  - c. Maintained School's delegated budgets and funding for the early years provision, in both the maintained and independent sector of £117.650m.
  - d. Business Rates of £2.412m
12. For the purposes of declaring the DSG outturn, the amount of Individual Schools Budget (ISB) actually distributed to schools is regarded, for DSG purposes, as spent by the authority once it is deployed to schools' budget shares. School reserve balances are reported later within this report.
13. For 2023/24 the DSG cumulative deficit of £28.715m will be held in the DSG Adjustment Account: this includes the deficit brought forward from 2022/23 of £22.080m. The deficit will need to be resolved in future years as part of the High Needs strategic recovery plan. Full

details of reserve transactions are reported in Appendix B of this report.

14. The School Specific Contingency reserve remains ring fenced as at 31 March 2024, the reserve closed with a surplus balance of £0.980m. Table 1 below summarises the reserve position at year end.

**Table 1 – Central DSG Reserve Summary**

	<b>Central DSG Reserve</b>	<b>School Specific Contingency Reserve</b>	<b>Total Reserve</b>
	<b>£ m</b>	<b>£m</b>	<b>£m</b>
<b>Cumulative roll forward DSG reserve Available at 1/4/2023</b>	<b>(23.317)</b>	<b>1.237</b>	<b>(22.080)</b>
Less net expenditure in 2023/24 <i>(details Appendix B)</i>	(6.378)	(0.257)	(6.635)
<b>Accumulated carry forward balance to 2023/24</b>	<b>(29.695)</b>	<b>0.980</b>	<b>(28.715)</b>

**Dedicated Schools Grant Conditions of Grant and the DfE**

15. To compile the DfE annual school reserves and Dedicated Schools Grant assurance testing data the DfE request information from Local Authorities in relation to the deployment of the Dedicated Schools Grant (DSG) for the Outturn to be signed off by the Director of Finance and Legal Services usually during July in respect of the preceding financial year.
16. Under Schedule 2 of the School and Early Years Finance (England) Regulations 2022, local authorities are required to carry forward overspends to their school’s budget either in the immediately following year or the year after. They can apply to the Secretary of State to disregard this requirement. In the case of the Secretary of State giving such permission, this may be for all or part of the sum requested by a local authority, and permission may be given subject to conditions.

17. The impact of these statutory provisions will be that a Local Authority with a DSG deficit from the previous year must either:
- carry the whole of the deficit forward to be dealt with in the school's budget for the new financial year,
  - carry part of it forward into the new financial year and the rest of it into the following financial year,
  - carry all of it into the following financial year,
  - apply to the Secretary of State for authorisation to disregard the requirements in Schedule 2 relating to deficits if it wishes to fund any part of the deficit from a source other than the DSG.

### **Further conditions relating to DSG overspends and deficits**

18. Any Local Authority that has an overall deficit on its DSG account at the end of the 2022 to 2023 financial year, or whose DSG surplus has substantially reduced during the year, must co-operate with the Department for Education (DfE) in handling that situation. In particular, the Local Authority must:
- Provide information as and when requested by the Department about its plans for managing its DSG account in the 2023/24 financial year, and subsequently,
  - Provide information as and when requested by the Department about pressures and potential savings on its high needs budget,
  - Meet with officials of the Department as and when they request to discuss the Local Authority's plans and financial situation,
  - Keep the Schools Forum regularly updated about the Local Authority's DSG account and plans for handling it, including high needs pressures and potential savings.
19. The Secretary of State reserves the right to impose more specific conditions of grant on individual local authorities that have an overall deficit on their DSG account, where he believes that they are not taking sufficient action to address the situation.

### **Individual Schools Budgets – DSG Expenditure**

20. Table 2 summarises the schools' opening reserves of £7.593m at 1 April 2023 and the movement to the closing position of £6.188m at 31 March 2024.



**Table 2 – School Reserve Balances from Delegated Budgets**

Reserve Type	2023/24 Opening Balance	Adj. for Academies	Net addition to / (Use of) Reserves	2023/24 Closing Balance
	£m	£m	£m	£m
Specific Contingency	5.456	(0.473)	(0.951)	4.032
Boarding Capital Projects	1.575	0.000	0.309	1.884
LA Capital Projects	0.953	0.000	(0.055)	0.898
Approved Capital Loans	(0.131)	0.000	(0.021)	(0.152)
Reserves to Balance Budget/ Deficit Budgets	(0.259)	0.000	(0.215)	(0.474)
	<b>7.593</b>	<b>(0.473)</b>	<b>(0.933)</b>	<b>6.188</b>

21. Table 3 provides further detail of the movement in school reserves.

**Table 3 – Movement in School Reserves**

	£ m
<b>Opening balances at 1/4/2023</b>	<b>7.593</b>
Reserves utilised by maintained schools during 2023/24	(1.861)
Adjustment for Academies	(0.473)
Additions to Reserves during 2023/24	0.274
In year surplus balances for schools at 31 March 2024 (added to reserves)	2.199
In year deficits for schools	(1.523)
New Loans	(0.056)
Loan repayments	0.035
<b>Closing balance at 31/03/2024</b>	<b>6.188</b>

22. The reserves in Table 4 relate to activities such as before and after school clubs, extended school arrangements, cluster arrangements, adult education and leisure activities.

**Table 4 – School Trading Accounts Reserve Balances**

<b>Reserve Type</b>	<b>2023/24 Opening Balance</b>	<b>Adj. for Academies</b>	<b>Net Increase in Reserves</b>	<b>2023/24 Closing Balance</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>
School Trading Accounts	1.931	(0.117)	0.119	1.933

23. The Scheme for Financing Schools provides detail of the Local Authority Balance Control Mechanism (BCM) which gives the Director of Children’s Services authority to remove balances in excess of 8% of School Budget Share (primary and special schools) and 5% of School Budget Share (secondary schools). For those schools that set aside reserves to balance the following year’s budget, but subsequently don’t require some or all the amount set aside, the Director of Children’s Services may claw back the excess amount.
24. At 31 March 2024 ten schools held balances greater than those permitted within the Balance Control Mechanism. The value of these reserves is £0.523m. It has been determined by the Director of Children’s Services and the Service Director for Early Help, Schools, SEND & Family Solutions that these surplus reserves will not be removed from the schools and retained centrally.
25. Twenty Three schools set aside reserves to balance their 2023/24 budget. The value of these reserves is £2.102m. It has been determined by the Director of Children’s Services and the Service Director for Early Help, Schools, SEND & Family Solutions that any surplus reserves will not be removed from the schools and retained centrally.
26. At 31 March 2024 eleven schools ended the year with financial deficits. All schools had previously notified the Local Authority of their financial position. The relevant schools have been contacted in order to provide details of the respective financial plans to recover deficits which will be deducted from the 2024/25 school budget in the first instance. The Local Authority is working with these schools to balance its budget in 2024/25.
27. During 2023/24 no schools operated with a Licensed Deficit.

## **HTCF - Budget Working Group Discussed**

28. Yes – 18 June 2024.

### **Finance**

29. From 1 April 2006, the Schools Budget has been funded by a direct grant: Dedicated School Grant (DSG).

### **Law**

30. The Schools Forum is a statutory decision making and consultative body constituted in line with the School Standards and Framework Act 1998, and its associated regulations, including the Schools Forum (England) Regulations 2012, to enable members of the local school community to work in partnership with Dudley Metropolitan Borough Council when making decisions about school funding and finances.

31. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2023.

### **Risk Management**

32. There are no material risks to the Council's Risk Management Framework resulting from the contents of this report

### **Equality Impact**

33. This report has no direct implications for the Council's commitment to equality and diversity.

### **Human Resources/Organisational Development**

34. This report has no direct implications for human resources, organisational development or service transformation.

### **Commercial/Procurement**

35. There is no impact on the potential to commercially trade and no impact on our customer base.

## **Council Plan**

36. The 2022/2025 Council Plan is clear in its ambitions for educational outcomes including raising skills, educational and work potential, increasing good or better schools and closing the gap for disadvantaged pupils.
37. This report relates to the use of the Dedicated Schools Grant funding to support the educational outcomes of children and young people in the borough.
38. As a result of the Council's focus on an Improvement and Sustainability Programme, the current Council Plan has been paused to allow a new one-year plan which will reflect the focus on improvement and financial sustainability.



**Catherine Driscoll**  
**Director of Children's Services**

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## **Background Papers**

Appendix A – Dedicated Schools Grant Outturn Statement 2023/24 – as at 31 March 2024.

Appendix B – Dedicated Schools Grant Accumulated Reserve – as at 31 March 2024.

**Dedicated Schools Grant Outturn 2023/24**

**Appendix A**

<b>Directorate of Children’s Services DSG Budgets</b>	<b>2023/24 DSG Latest Budget  £m</b>	<b>2023/24 DSG Forecast Outturn  £m</b>	<b>2023/24 Variance ( ) = under spend  £m</b>	<b>Comments</b>
Individual Schools Budget (ISB) Post 16 pupils - 6 <sup>th</sup> Form Funding	120.857  1.064	120.857  1.064	0*  0	*Schools can roll-forward any under spend (Nursery, Primary, Secondary & Special) Dudley 6 <sup>th</sup> form school - OSH
De- Delegated Budgets	0.235	0.235	0	
Centrally Retained Budgets	54.604	56.593	1.989	Significant pressures as a result of increased demand of Education Health and Care Plans.
Education Funding Agency (ESFA) 6 <sup>th</sup> form grant	(1.064)	(1.064)	0	Oldswinford Hospital School
Use of DSG Reserve	(4.646)	22.080	26.726	Original budget assumed deficit position of £4.646m on high needs block for 2023/24 and B/Fwd deficit of £26.676m from 2022/23.
<b>Total DSG payable to Dudley 2023/24</b>	<b>171.050</b>	<b>199.765</b>	<b>28.715</b>	

Academy Schools Funding paid to School via ESFA	145.978	145.978	0	Allocated to Academy Schools directly via the Education & Skills Funding Agency 47 schools at 31 March 2023
Business Rates Allocation	2.412	2.412	0	Centralised business rates for maintained schools and academies – note new system from 2022/23
<b>Total DSG 2023/24</b>	<b>319.439</b>	<b>348.155</b>	<b>28.715</b>	

**Centrally Retained Dedicated Schools Grant Reserve Expenditure**

<b>Reserve Category</b>	<b>Opening Balance as at 01/04/23 £m</b>	<b>Additions to Reserves in Year £m</b>	<b>Use in Year £m</b>	<b>Net Use of Reserves £m</b>	<b>Closing Balance as at 31/03/24 £m</b>
<u>Central DSG Reserve</u>					
High Needs Block	(26.676)		(6.812)	(6.812)	(33.488)
Early Years Block	2.989	0.689		0.689	3.678
Central School Services Block	0.370		(0.254)	(0.254)	0.115
<b>Total Central DSG Reserve</b>	<b>(23.317)</b>	<b>0.689</b>	<b>(7.066)</b>	<b>(5.869)</b>	<b>(29.695)</b>
School Specific Contingency					
Rates Adjustments		0.266		0.266	
Professional Development Programme Grant – ring fenced			(0.088)	(0.088)	
Transfer from reserves – Growth Fund			(0.435)	(0.435)	
<b>Total School Specific Contingency Reserve</b>	<b>1.237</b>	<b>0.266</b>	<b>(0.523)</b>	<b>(0.257)</b>	<b>0.980</b>
<b>Total DSG Reserve</b>	<b>(22.080)</b>	<b>0.266</b>	<b>(1.165)</b>	<b>(0.899)</b>	<b>(28.715)</b>

## **Schools Forum 25 June 2024**

### **Report of the Director of Children's Services**

### **Dedicated Schools Grant – School Specific Contingency Reserves 2023/24 Outturn and 2024/25 Budget**

#### **Purpose of report**

1. To update Schools Forum on the use of the Dedicated Schools Grant (DSG) School Specific Contingency Reserve in 2023/24 and the proposed use of this Reserve in 2024/25.

#### **Schools Forum Role and Responsibilities**

2. Schools Forum is the 'guardian' of the local Schools Budget, and its distribution among schools and other bodies, and therefore must be closely involved throughout the development process.

#### **Recommendations**

3. It is recommended that Schools Forum members note the report on the use of the Dedicated Schools Grant (DSG) School Specific Contingency Reserve in 2023/24 and the proposed use of the Reserve in 2024/25.

#### **Background**

4. It was previously agreed that reports would be presented to Schools Forum to confirm further details of the balances remaining within the Schools Specific Contingency Reserve and to give Schools Forum the details of the Director of Children's Services proposals regarding the use of the reserve.



5. The table below reflects the position of the School Specific Contingency Reserve in 2023/24 and the planned spend for 2024/25.

<b>Activity</b>	<b>Opening Balance 01/04/2023 £000s</b>	<b>Use in year (-) £000s</b>	<b>Closing Balance 31/03/2024 £000s</b>
Ring fenced contingency – Professional Development Programme grant reserve. Continuing activities to meet grant requirements	0.087	-0.020	0.067
Support to schools for implementation of the SEND Strategy - training and other support to mainstream and special schools on SEND and Inclusion	0.511	-0.068	0.443
Ring fenced Union Facilities – De delegations. Agreed to roll forward underspends from vacancies to support pressure in future years	0.083		0.083
Growth Fund Contingency - under / overspends compared to in-year allocation	0.283	-0.169	0.114
Business Rates - contingency to support revaluations	0.273		0.273
<b>Total</b>	<b>1.237</b>	<b>-0.257</b>	<b>0.980</b>

6. As previously agreed at Schools Forum in October 2021, a proportion of the £0.511m SEND Strategy Funding is being used for the appointment of a SEND Lead Practitioner and two SEND Support Officers. The SEND Lead Practitioner co-ordinates a response to SEND and pupil needs between the Core SEND team and School Improvement. The post becomes the bridge between the code of practice and day to day implementation in schools. This was focused on being a secondment opportunity from someone currently within a Dudley school/LA.
7. In supporting this role, two designated SEND Support Officers will with the SEND Lead Practitioner collectively form a SEND Development Team which ensure that the work of the Core SEND team and School Improvement is linked and effective. This will ensure that SEND is a high-profile initiative and across the school estate. The cost of these posts are approximately £0.150m for the SEND Lead Practitioner post (fixed term two years) and £0.110m for the two SEND Support Officers (fixed term two years). In addition, £0.080m is earmarked for staff training and school workforce development. A plan for this is being developed now that the

Lead Practitioners and SEND Support Officers are in post. Additional CPD resource will be allocated to support nurture and resilience and TIAAS. The spending plan is influenced by the concurrent Delivering Better Value spending plan and consideration is being given to the optimum funding stream for each related activity.

### **HTCF - Budget Working Group Discussed**

Yes – 18 June 2024.

### **Finance**

8. From 1 April 2006, the Schools Budget has been funded by a direct grant: Dedicated School Grant (DSG).

### **Law**

9. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2024.
10. The Schools Forum is a statutory decision making and consultative body constituted in line with the School Standards and Framework Act 1998, and its associated regulations, including the Schools Forum (England) Regulations 2012, to enable members of the local school community to work in partnership with Dudley Metropolitan Borough Council when making decisions about school funding and finances.

### **Risk Management**

11. There are no material risks to the Council's Risk Management Framework resulting from the contents of this report.

### **Equality Impact**

12. This report has no direct implications for the Council's commitment to equality and diversity.

### **Human Resources/Organisational Development**

13. This report has no direct implications for organisational development, human resources or service transformation.

## **Commercial/Procurement**

14. There is no impact on the potential to commercially trade and no impact on our customer base.

## **Council Plan**

15. The 2022/2025 Council Plan is clear in its ambitions for educational outcomes including raising skills, educational and work potential, increasing good or better schools and closing the gap for disadvantaged pupils.

This report relates to the use of the Dedicated Schools Grant funding to support the educational outcomes of children and young people in the borough.

As a result of the Council's focus on an Improvement and Sustainability Programme, the current Council Plan has been paused to allow a new one-year plan which will reflect the focus on improvement and financial sustainability.



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## **Schools Forum 25<sup>th</sup> June, 2024**

### **Report of the Director of Children's Services**

#### **Delivering Better Value (DBV) in SEND Update**

##### **Purpose**

1. To provide Schools Forum with an update on the Delivering Better Value in SEND programme in Dudley.

##### **Recommendations**

2. That Schools Forum:
  - Note the content of the DBV Update Report

##### **Background**

3. Dudley is now eight months into the DBV programme for Workstream 1 (Redesign of our Specialist Services and OAIP Offer) and Workstream 2 (Developing and Delivering our Sufficiency Strategy), while Workstream 3 (Post 16 & Post 19, Preparing for Adulthood) is five months in.

In May, we met with our DfE colleagues, who remain impressed by the pace of activity and the emerging impacts of our work and partnerships. These efforts aim to improve outcomes for children with SEND while addressing financial challenges and pressures within the system and our High Needs Block (HNB) of the Dedicated Schools Grant (DSG).

##### **Activity since Feb 2024: Key Developments**

#### 4. **Workstream 1 - Redesigning our specialist services and OAIP offer**

Workstream 1, is progressing well with focus on restructuring staff and service delivery to improve accessibility and support in mainstream schools.

We are pleased to report that we have concluded the identification of service gaps within our specialist services. This comprehensive assessment has provided an insight into the areas needing improvement. In addition, the four-week consultation period to support the necessary staff structural changes is now complete. This process aligns with our overarching goal of enhancing both the structural framework and the delivery model of our Specialist Inclusion Service, now known as 'CIPS' (Communication & Interaction, Physical & Sensory Advisory Service).

Following the gap assessment, we have commenced the redesign phase, targeting areas identified for improvement. Beginning with streamlining the referral pathway into the service, a key challenge highlighted by schools and stakeholders, and we are committed to making the process smoother and more efficient. This redesign work will continue over the coming months, with a detailed implementation plan in line for development. This plan will encompass all the necessary adjustments, documents, and internal processes, leading up to the planned go-live date in September 2024. This will help us make sure that our changes are making a real difference for children and families.

#### **OAIP (Ordinarily Available Inclusion Provision, sub-workstream 1.2)**

Good progress has been made in developing an inclusive framework for SEND support, now named OAIP (Ordinarily Available Inclusion Provision). Key milestones have been reached, including a draft of the framework. Moving forward, we will focus on obtaining feedback and approval, planning the framework's rollout, providing training, and conducting baseline assessments.

#### **Coproduction (sub workstream 1.1)**

As part of our ongoing efforts to promote coproduction approximately 90 nursery, primary and secondary settings registered to take part in the Four Cornerstones training in March and April. To further strengthen our partnerships, we are working closely with the Parent Carer Forum (PCF) and our communications team to finalise

Dudley's 'Co-Pro Charter. The charter aligns with the four cornerstones framework and aims to articulate our collective vision while promoting trust, effective communication, and a culture that values diverse perspectives and contributions across the SEND partnership. In addition, we have co-developed a draft 'Protocol and Success Measures' framework to measure the effectiveness of coproduction. These tools will help us assess our engagement with schools, parent carers, and partners.

Moving forward, our primary focus will be on conducting sessions to introduce the charter and the success measures framework. These sessions will aim to ensure that schools and all stakeholders understand its purpose and key components.

### **Supporting Schools to Build Capacity (sub-workstream 1.5)**

We have identified training opportunities to meet the needs evaluated in schools. To ensure these opportunities are appropriate, certain projects will be trialled with interested schools, and feedback will be evaluated before expanding to more settings. The schools will be identified during the next half term, with training beginning in September. Additionally, some bespoke training opportunities, such as Makaton, are being rolled out to schools as they become available.

### **Workstream 2 - Developing and delivering our Sufficiency Strategy.**

We are pleased to report we have commissioned the third-party supplier 1st Planner to support Dudley in developing our SEND & AP Sufficiency Strategy. The planning and preparation work for this is now fully underway. Multiple schools and stakeholders have shown interest in forming part of this workstream, and the workshops to develop the strategy are now underway.

We are currently awaiting confirmation from the Regional Schools Commissioner on their agreement for three schools to open bases within their settings. Woodside Primary School and Priory Primary School were chosen by our multiagency panels to host 12 place Send Units and Ellowes Secondary School was chosen to host an SEMH Base. These bases are planned to open in January 2025 once approval is granted. The Crestwood Base for young people with SEND related social and emotional needs and anxiety is due to open its door to students in September.

There is an agreement for four more bases within the next two years, this work will be integrated into the sufficiency strategy development work within Workstream 2.

All 5 of Dudley early years inclusion hubs are now operational offering places for children in their earliest years who have been identified with a special educational need. The hubs, based within mainstream schools offer 44 early interventions spaces for nursery children across the Dudley borough delivering personalised, targeted and specialist interventions for children and families. Children are in attendance in all 5 Hubs currently. The Early Inclusion Hubs Leadership Forum has commenced with all 5 Hub Leads attending, sharing best practice, and learning that can be disseminated. In addition, children (for the 2nd cohort) have been identified through robust APDR (Assess, Plan, Do, Review) for placement in the new academic year.

### **Workstream 3 – Preparation for Adulthood**

For Workstream 3, we are focused on commencing the important work to prepare young people for adulthood beyond the age of 16. We have started this process with engaging with stakeholders, including college leaders to understand the current pathways for post-16 preparation for adulthood (PfA). Our discussions aim to identify available internship programs and address challenges faced by young people, particularly those with special educational needs and disabilities (SEND). Over the coming weeks we will also be engaging with our wider stakeholders to ensure we are embracing a joined-up approach to ensure all young people receive the support they need for a successful transition into adulthood.

Close collaborative working is underway with colleagues in Dudley Adult Social Care who are leading on the Post 19 PfA to ensure seamless integration. Our aim is to thoroughly consider any overlaps.

#### **Implementing Independent Travel Training (sub-workstream 3.5)**

As of March, work has now commenced for this sub-workstream. We are reviewing historical work carried out and a project plan is in development. Recruitment is underway for a Travel Training coordinator to lead on the training.

## **Workstream 4 – Redesigning our Spend Profile**

Whilst not part of the formal agreement with the DfE, this workstream is a vital component that forms the foundation for all other DBV work being undertaken. Its primary objective is to optimise our spending by identifying Post 16 EHCPs suitable for cessation and improving the timeliness of annual reviews.

In terms of progress, between Jan 23' to Jan 24' cessations increased by 68%, from 163 (2023) to 274 (2024). However, while there was a 14.6% increase in total value, the average value of ceased EHCPs decreased from £6,704 to £4,573.

Table 1 below shows the programme plan of Workstream activities for the period from April 2024 to June 2024, providing a high-level overview of the next steps for each workstream within the programme. A more detailed breakdown of activities is shared by workstream leads within each of the stakeholder working groups.



Table 1. Programme Plan of Workstream Activities for April 2024 to June 2024

<b>Workstream 1 - Redesigning our specialist services and OAIP offer.</b>					
	Next Steps (Between Apr to Jun 2024)	Impact	RAG Status		
			On track	Monitor	At Risk
<p><b>1.1 Commissioning of Genuine Partnerships</b></p> <p><b>Purpose:</b> Foster collaborative partnerships to enhance stakeholder engagement, leverage external resources, and promote co-production values.</p>	<ul style="list-style-type: none"> <li>• Share the success measures and Dudley Co-Pro Charter with stakeholders, partners &amp; schools.</li> <li>• Undertake prep-work for online sessions to explain framework purpose &amp; key components.</li> <li>• Co-develop partnership agreements and monitor their contributions</li> </ul>	<ul style="list-style-type: none"> <li>• Enhanced collaboration with external partners</li> <li>• Improved stakeholder engagement- Strengthened co-production values</li> </ul>	On Track		
<p><b>1.2 Reframing our Ordinarily Available Provision (OAP) Offer</b></p> <p><b>Purpose:</b> An inclusive framework for improved access and effectiveness while setting clear expectations for schools and settings</p>	<ul style="list-style-type: none"> <li>• Obtain DLT approval of final version of OAIP framework.</li> <li>• Planning and preparation for the rollout of the OAIP.</li> <li>• Continue with baseline assessments on EHCP requests and other relevant metrics before, during and after implementation.</li> </ul>	<ul style="list-style-type: none"> <li>• Clear expectations for OAP in schools and settings</li> <li>• Enhanced provision of support, resources, and services</li> </ul>	On Track		
<p><b>1.3 Redesigning our Specialist Services Delivery Models</b></p> <p><b>Purpose:</b> Adopt an outward-facing approach to foster greater school support, confidence, and in-house capacity for children with SEND</p>	<ul style="list-style-type: none"> <li>• Service redesign sub-groups to be developed for further integration and alignment of service delivery for both Communication &amp; Interaction and Physical &amp; Sensory services.</li> <li>• Develop task &amp; finish sub-group to undertake the development of the internal staff training schedule for capacity building following restructure</li> </ul>	<ul style="list-style-type: none"> <li>• Improved support and confidence in schools</li> <li>• Enhanced in-house capacity to meet children's needs</li> </ul>	On Track		
<p><b>1.4 Supporting Schools to Build Capacity</b></p>	<ul style="list-style-type: none"> <li>• Review training to be undertaken.</li> <li>• Identify settings as training pilots.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved capacity of mainstream schools</li> <li>• Enhanced support for children without EHCPs</li> </ul>	Monitor		

Workstream 1 - Redesigning our specialist services and OAIP offer.					
	Next Steps (Between Apr to Jun 2024)	Impact	RAG Status		
			On track	Monitor	At Risk
<p><b>Purpose:</b> Identify training needs, develop tailored materials, and equip mainstream settings to support children without EHCPs</p>	<ul style="list-style-type: none"> <li>Commission training providers (where required)</li> </ul>				

Workstream 2 - Developing and delivering our sufficiency strategy.					
	Next Steps (Between Apr to Jun 2024)	Impact	RAG Status		
			On track	Monitor	At Risk
<p>2.1 Developing and Implementing Sufficiency Plan</p> <p><b>Purpose:</b> To create a comprehensive plan that ensures there are adequate services and resources to meet the current and future needs of children and young people with SEND in Dudley</p>	<ul style="list-style-type: none"> <li>Engage key stakeholders for strategy development and undertake series of workshops.</li> </ul>	<ul style="list-style-type: none"> <li>Improved service adequacy and resource allocation</li> <li>Enhanced understanding of children's needs and capacity gaps.</li> </ul>	Monitor		
<p>2.2 Implementation of Resource Bases/SEND Units &amp; 2.3 Commissioning of Resource Bases/SEND Units for 2024</p> <p><b>Purpose:</b> To establish and operate Resource Bases and SEND Units to provide specialised educational support and services for children and young people with SEND</p>	<ul style="list-style-type: none"> <li>Provide support to the two new resource base schools to ensure a seamless set-up</li> </ul>	<ul style="list-style-type: none"> <li>Establishment of resource bases and SEND units.</li> <li>Integration with mainstream schools</li> <li>Expansion of resource bases</li> </ul>	On Track		
<p>2.4 Commissioning &amp; Implementation of Early Years Inclusion Hubs</p> <p><b>Purpose:</b> To ensure the smooth implementation and operation of the Early Years Inclusion Hubs</p>	<ul style="list-style-type: none"> <li>Undertake planning and prep work for the 2<sup>nd</sup> cohort (sept 2024)</li> </ul>	<ul style="list-style-type: none"> <li>Establishment &amp; rollout of Early Years Inclusion Hubs</li> </ul>	On Track		

Workstream 3 – Preparation for Adulthood					
	Next Steps (Between Apr to Jun 2024)	Impact	RAG Status		
			On track	Monitor	At Risk
3.1 Develop the Post 16 and Post 19 PFA Pathway  <b>Purpose:</b> Create a clear transition pathway for young people with disabilities.	<ul style="list-style-type: none"> <li>Undertake planning and preparation for effective pathway mapping.</li> <li>Conduct a survey of current education providers regarding curriculum provision.</li> <li>Engagement with broader stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Empowering smooth transition for young people and preparing them for adulthood</li> </ul>	Monitor		
3.2 Development of Apprenticeships and Supported Internships  <b>Purpose:</b> Create Apprenticeship and Supported Internships opportunities for Young People with SEND in Dudley	<ul style="list-style-type: none"> <li>Establish communication channels and partnerships with the local Employment &amp; Skills Board</li> <li>Create a comprehensive list of training and apprenticeship providers across the borough.</li> <li>Evaluate the current availability and demand for supported internships and apprenticeships within the community</li> </ul>	<ul style="list-style-type: none"> <li>Enabling pathways to employment for young people</li> </ul>	Monitor		
3.3 Implement Independent Travel Training  <b>Purpose:</b> Empower young people with disabilities travel skills for independence	<ul style="list-style-type: none"> <li>Develop project and implementation plan.</li> <li>Develop travel training curriculum.</li> <li>Establish training partner and /or coordinator</li> </ul>	<ul style="list-style-type: none"> <li>Enhancing mobility and independence of young people</li> </ul>	Monitor		

Workstream 4 – Redesigning our Spend Profile					
	Next Steps (Between Apr to Jun 2024)	Impact	RAG Status		
			On track	Monitor	At Risk
4.1 EHCP Cessations – Post 16  <b>Purpose:</b> Improve the annual review process	<ul style="list-style-type: none"> <li>Continue to identify and prioritise Year 11 EHCPs to be targeted for cessation.</li> </ul>	<ul style="list-style-type: none"> <li>Driving down costs</li> </ul>	Monitor		

### **Finance**

5. Grant funding of £1m from DfE supports the ongoing development and initial delivery of the Delivering Better Value in SEND (DBV) programme outcomes during 2023/24 and 2024/25. Base budgets within the Dedicated Schools Grant (DSG) (High Needs Block) and capital funding approved within the local authority's capital programme will also support ongoing activities as detailed above which will seek to achieve required efficiencies. As at the end of the financial year 2023/24, the local authority had a (provisional) deficit balance on the DSG (High Needs Block) of £33.5m with a current budgeted deficit for 2024/25 of £36.1m. The programme aims to bring under control and reverse this increasing deficit, which can, until the end of the 2025/26 financial year, continue to be held in an unusable reserve and carried forward as a deficit on the local authority's DSG balance.

### **Law**

6. The Schools Forum is a statutory decision making and consultative body constituted in line with the School Standards and Framework Act 1998, and its associated regulations, including the Schools Forum (England) Regulations 2012, to enable members of the local school community to work in partnership with Dudley Metropolitan Borough Council when making decisions about school funding and finances. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2023.

### **Risk Management**

7. There are no material risks to the Council's Risk Management Framework resulting from the contents of this report.

### **Equality Impact**

8. This report has no direct implications for the Council's commitment to equality and diversity.

### **Human Resources/Organisational Development**

9. This report has no direct implications for human resources, organisational development, or service transformation.

### **Commercial/Procurement**

10. There is no impact on the potential to commercially trade and no impact on our customer base.

### **Council Plan**

11. The 2022/2025 Council Plan is clear in its ambitions for educational outcomes including raising skills, educational and work potential, increasing good or better schools and closing the gap for disadvantaged pupils. This report relates to the use of the Dedicated Schools Grant (HNB) funding to support the educational outcomes of children and young people in the borough.



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