

Meeting of the Dudley Schools Forum

**Tuesday 20th June, 2023 at 6.00pm
on Microsoft Teams**

[Click on this link to access the Meeting](#)

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 28th March, 2023 \(Pages 5 - 14\).](#)
5. Any other matters arising from the Minutes of the meetings of the Forum held on 28th March, 2023, not included on the agenda for this meeting.
6. Head Teachers Consultative Forum – Budget Working Group Verbal Feedback
7. [Schools Forum Membership \(Pages 15 – 20\)](#)
8. [Schools Forum Proposed Meetings and Forward Plan for the 2023/24 Academic Year \(Pages 21 – 27\)](#)
9. [Combined Services Budget Outturn 2022/23 \(Pages 28 – 32\)](#)



10. [Dedicated Schools Grant Outturn and School Reserves 2022/23](#)
(Pages 33 – 43)
11. [Delivering Best Value in SEND Update](#) (Pages 44 – 50)
12. [Directorate of Children’s Services Verbal Update](#)



Chief Executive

Dated: 12th June, 2023

Distribution:

Members of Dudley Schools Forum

Nursery School Headteacher: Miss A Ward;

Primary School Headteachers: Mrs C Finnegan, Mrs A Hannaway, Ms L Maskell and 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: Miss J Colbourne;

Special School Governor: Mr P Leyshon;

Academy Members: Mrs R Cox, Mr C Finnerty, Mrs J Higgins, Mr M Kelay, Mr S Lanckham, Ms E Stanton, Miss F Sumner, Mr K Tranter, Mr A Webb and Vacancy;

Pupil Referral Unit Representative: Mrs V Howard;

Non-School Members: Mrs E O’Brien, Mrs J Williams, Ms A Middleton and Mr T Reid.

Non-Voting Attendees

Councillor R Buttery - Cabinet Member for Children and Young People;

Councillor K Lewis - Chair of Children and Young People Select Committee;

C Driscoll – Director of Children’s Services;

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

- Agendas containing reports with exempt information should be treated as private and confidential. It is your responsibility to ensure that information containing private and personal data is kept safe and secure at all times. Following the meeting you should ensure that the information is securely stored and destroyed within six months.
- 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
- You can view the [Democratic Services Privacy Notice](#) and more information about the Council and our meetings on the website www.dudley.gov.uk

If you are reading these documents on an electronic device, you have saved the Council £7.00 (on average) per printed agenda and helped reduce the Council's carbon footprint

**Minutes of Dudley Schools Forum
Tuesday, 28th March, 2023 at 6.00 pm
Microsoft Teams**

Present:

Mrs J Belcher (Chair)
Mrs J Morgan (Vice-Chair)
Mrs R Cox, Mrs C Finnegan, Mrs A Hannaway, Mrs V Howard, Mr P Leyshon,
Ms L Maskell, Mr M Mynott, Mr K Tranter, Mrs A Ward, Mrs S Watson

Non-Voting Officers:

C Driscoll (Director of Children's Services), M Palfreyman (Head of Education Outcomes and Inclusion), S Thirlway (Service Director Education, SEND and Family Solutions), L Jones-Moore (Finance Manager), J Wilson (Principal Accountant) and G Gray (Democratic Services Officer)

Also in Attendance:

Councillor R Buttery (Cabinet Member for Children and Young People)
Councillor P Bradley (Chair of Children and Young People Scrutiny Committee)

46 **Introductions by the Chair**

The Chair welcomed everyone to the meeting.

47 **Apologies for Absence**

Apologies for absence from the meeting were submitted on behalf of Mr S Lanckham, Mrs A Middleton, Mr M Moody, Mrs E O'Brien, Mrs S Parkes, Mr B Roe and Mrs F Sumner.

48 **Substitute Members**

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

49 **Minutes**

Resolved

That the minutes of the meeting held on 28th February, 2023, be approved as a correct record.

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

V Howard, Pupil Referral Unit Representative, provided feedback on the discussions held at the previous Head Teachers Consultative Forum – Budget Working Group (HTCF-BWG) meeting advising that the Head of Education and Outcomes provided an update at the meeting and in doing so advised that a further six Office for Standards in Education (OFSTED) inspections had been carried out and from those inspections pupil exclusions and suspensions from schools had been the main concern.

It was reported that further strike action for Teachers had been undertaken within the first two weeks of March, with an agreement being made with the Unions for a period of calm for the upcoming weeks.

It was advised that forty colleagues were in attendance at a stakeholder meeting concerning the Special Educational Needs and Disability (SEND) Bases; that £1.8m of the capital investment had been set aside for the Bases and that the redesign for the Pupil Referral Units (PRU) and assessment centres were ongoing.

The Budget Working Group were advised that building work had commenced on the Shirelands Coseley Technology College and Pens Meadow School, however, budget pressures remained a growing concern.

C Ludwig, Finance Manager provided an update at the meeting on the final Dedicated Schools Grant (DSG) Budget Process for 2023/24 and in doing so it was noted that there were no requests to move money between the four funding blocks; that there would be further in year adjustments in respect of the Early Years Funding block; that the High Needs budget was being reviewed and that a tendering process was being undertaken regarding 12 SEND units.

Reference was made to Pages 14 and 15 of the report outlined at the Budget Working Group meeting, which provided details of funding for special and short stay schools together with a table summarising the budget position regarding alternative provision spending.

It was noted that the revenue grant rate relating to pupil premium for 2023/24 had increased by 5%; that the PE Sports Grant would continue and that details of other Grants available were outlined in the report submitted at the Budget Working Group meeting.

In response to a question raised by Heads at the Budget Working Group, the Head of Education and Outcomes confirmed that funding for current SEND bases would not be changed for the current year and that funding would be aligned throughout the next three years. Places for the new bases would be costed at £17,000 per pupil.

Heads raised further questions regarding pupils with challenging behaviours at reception level and it was stated that support for Schools would be welcomed.

The Principal Accountant had outlined how the Local Authority were moving towards the New Funding Formula at the Budget Working Group meeting.

Secondary Heads raised concerns regarding the inconsistency of OFSTED's approach across schools in Dudley together with concerns regarding meeting the needs for pupils with complex issues that were entering Key Stage 3 including the ongoing challenges schools faced in managing budgets.

In response to a query raised by Mrs R Cox, Academy Member representative, the Head of Education Outcomes clarified that there were 12 SEND units that were undergoing a tendering process. It was advised that there were 5 new Primary SEND units together with 3 new Secondary SEND units planned for 2022/23 with a further 4 SEND units planned for 2023/24.

In regards to a question raised by Mr P Leyshon, Special School Governor representative concerning staffing being sought for the additional children that were being incorporated into the SEND Bases, the Head of Education Outcomes and Inclusion clarified that as part of the tender specification there would be a cash allocation for the children placed at the Bases, that staffing would be covered by the cost of those places, that the tender specification outlined various staffing structures and that successful schools would need to provide their own preferred staffing structure.

It was advised that Commissioning colleagues were carrying out the tendering process with a view to announce the successful applicants on 1st May 2023, in order to allow Head Teachers to recruit staff prior to September. The Head of Education Outcomes and Inclusion advised that the budget for the SEND Bases would be a standalone entity within the school's budget with funding being provided for approximately £17,000 a year per place.

A further query was raised by Mr P Leyshon, Special School Governor representative concerning the 27 schools that had expressed an interest and the selection process to allocate 8 SEND Bases, the Head of Education Outcomes and Inclusion advised that Commissioning colleagues had established a service specification criteria and a formal tendering process to ensure that selection was fair and legitimate. It was recognised that further expressions of interests from schools would be submitted, however, it was noted that there would be additional SEND units to follow. It was noted that long-term plans as part of the Green Paper development for further SEND resource bases and provision on mainstream sites would be put in place moving forward.

In response to a query raised by Mrs A Hannaway, Primary School Headteacher representative, the Service Director of Education, SEND and Family Solutions advised that the Early Years consultation would be circulated to Members.

Resolved

That the feedback provided be noted.

51 **Dedicated Schools Grant Budget Process 2023/24 – 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 budget planning process for 2023/24 and to carry out the annual consultation on financial issues, as required by the Schools Forum (England) (Coronavirus) (Amendment) Regulations 2020.

The Finance Manager presented the report and in doing so, advised that there were no requests to transfer budgets between the four funding blocks for 2023/24; that there were no further DSG funding updates from the Department for Education (DfE) since the last Dudley School’s Forum meeting held on 28th February, 2023 and that there would be further in year adjustments in respect of the Early Years block during 2023/24 due to the lagged funding approach.

The Finance Manager referred to Table 1 regarding Dudley’s Provisional DSG 2023/24, which reflected the total provisional DSG for 2023/24 being £320.244m, which included the High Needs Block Additional Funding of £2.187m.

It was noted that Appendix A to the report submitted, outlined the details of the proposed funding levels derived as part of the matrix regarding High Needs for mainstream schools with no changes proposed from the previous financial year.

It was reported that indicative budgets for special schools and Pupil Referral Units (PRU’s) had been issued on an individual basis and that the tendering process was being carried out regarding the funding to support 8 SEND Bases as part of the first phase.

The Finance Manager referred Members to Appendix B to the report submitted, which outlined the Proposed Planned Place Commissioned and Central Provision 2023/24 Academic Year.

It was noted that Table 2 of the report submitted referred to the Commissioned Alternative Provision with a total Commissioned Activity of £1,226,400m together with £220,800 for Non-Commissioned Activity.

Members were referred to Revenue Grants and it was advised that the 2023/24 Pupil Premium Rates would be increased by 5%; that the DfE had confirmed that the PE and Sports Grant would continue for a further two years with a national investment of £600m; that the Household Support Fund, Holiday Activity Fund, Recovery Premium Funding and National Tutoring Grants would continue for 2023/24 and the supplementary grant to support schools in 2022/23 would be rolled into the formula allocation for mainstreams schools. The new Mainstream Schools Additional Grant (MSAG) had been established with an indicative allocation of £8.3m being allocated on a formula basis to individual schools.

The Finance Manager referred to the Capital Grants and in doing so advised that the Basic Need allocation for 2023/24 had been announced, however, it was stated that there would be no funding available for Dudley Schools.

The Finance Manager referred to Table 8 of the report submitted regarding the High Needs Provision Capital Allocations, and stated that there was an expected allocation of £3,899,186m for 2023/24.

In responding to a query by Mrs R Cox, Academy Member representative, the Finance Manager confirmed that Appendix B to the report submitted concerning the 32 Full Time Equivalent (FTE) places at Sycamore Short Stay School were for Key Stage 1 as well as Key Stages 2 and 3, which had been omitted from the Appendix.

A further query was raised by Mrs R Cox, Academy Member representative, concerning the capacity at Sycamore Short Stay School and whether the 32 FTE places at the School, referred to were regarding the same pupils. The Head of Education Outcomes and Inclusion advised that he would need to obtain this information and report back to the next meeting of the Budget Working Group. It was noted that Sycamore Short Stay School was the only Key Stage 2 provision and that a comprehensive PRU review would be undertaken to review Key stage 2, 3 and 4 provisions across the Borough.

A query was raised by Mrs R Cox, Academy Member representative regarding what analysis was undertaken to reduce the amount of funding received for the Holiday Activity Fund (HAF) and stated that although take up from parents had been low, spending on HAF had been high. In response the Service Director of Education, SEND and Family Solutions clarified that HAF funding was commissioned by the Council for Voluntary Service (CVS). The Service Director of Education, SEND and Family Solutions undertook to provide feedback to Members from CVS regarding attendance and the cost of delivery of HAF.

In response to a query raised by Mrs R Cox, Academy Member representative, regarding information concerning Early Years SEND Units not being included within the report, the Finance Manager advised that information regarding the Commissioned and Central provision could be obtained from the Early Years Team and undertook to circulate that information to Members of the Forum as an appendix.

Mrs R Cox, Academy Member representative noted that the process for Primary and Secondary SEND units had commenced with a short timeframe to set up the units by September and it was recognised that Early Years would undergo the same process thereafter, therefore, there would be less time to establish the Early Years units, which would create further challenges.

In response to concerns raised by Mrs R Cox, Academy Member representative regarding the commissioned places for the SEND units being placed predominantly in the Stourbridge and Halesowen areas, the Head of Education Outcomes and Inclusion clarified that the areas identified were data driven and units would be placed where they were most needed.

In response to a query raised by Mrs A Hannaway, Primary School Headteacher representative, the Head of Education Outcomes and Inclusion confirmed that the commissioning data, which included Education, Health and Care Plans (EHCP's), was current data being used by the Commissioning team to identify the needs in Schools for September.

In responding to a query from Mr P Leyshon, Special School Governor representative concerning the Energy Efficient Grant, the Principal Accountant advised that the Energy Efficient Grant had been paid to schools as part of the devolved formula capital, which would need to be spent by the end of the financial year. However, it was noted that should energy efficiencies not be identified within Schools, the Grant could be rolled forward and included under the terms and conditions of the School's capital expenditure.

Mrs L Maskell, Primary School Headteacher representative advised that the Energy Efficient Grant allocation had been received at her School and was submitted to Governors as an improvement project, which included energy efficiencies, and this had been found to be beneficial.

Resolved

- (1) That the updated information in respect of the Dedicated Schools Grant and the annual consultation on financial issues for the 2023/24 financial year, be noted.
 - (2) That the information reported on that there had been no request to transfer budgets between the funding blocks for 2023/24, be noted.
 - (3) That the Head of Education Outcomes and Inclusion be requested to report on information to the next meeting of the Head Teachers Consultative Forum Budget Working Group concerning the capacity at Sycamore Short Stay School, namely concerning the 32 FTE places at the School as referred to in the report submitted.
 - (4) That the Service Director of Education, SEND and Family Solutions be requested to email to Members the information from CVS regarding attendance and the cost of the delivery regarding the Holiday Activity Fund.
 - (5) That the Finance Manager be requested to email to Members information regarding the Commissioned and Central provision for the Early Years SEND Units.
-

52 Dedicated Schools Grant Projected Outturn Update 2022/23

A report of the Director of Children's Services was submitted on the latest financial forecast in respect of the Schools Budget for the 2022/23 financial year ending 31st March, 2023.

The Finance Manager presented the report and in doing so advised that for 2022/23 the DSG was currently £301.299m, which included the business rates allocation of £2.406m and the Academy Schools allocation of £131.362m as at January, 2023.

Reference was made to Appendix B, which reflected the in-year deficit of £6.279m and the cumulative overall deficit of £24.413m.

It was advised that the High Needs Block overspend of £6.542m included £1.085m of unmet savings from the initial recovery plan together with ongoing net pressures of £5.457m in respect of the EHCP's. The Early Years Block reflected an underspend of £370,000, based on summer and autumn term payments to providers for two, three and four year olds and included staff related savings of £100,000.

It was stated that the Central Schools Service block evidenced an overspend of £107,000 as a result of pay award pressures and further pressures in relation to fines of the Education Investigation Service.

Members were referred to Appendix C to the report submitted and it was noted that the forecast for the year end position on the School Specific Contingency reserves were estimated at £1.031m.

Resolved

That the 2022/23 forecast outturn position as at 31st January, 2023 in respect of the centrally retained areas of the Schools Budget, which was funded by the DSG, be noted.

53 School and Early years Finance (England) Regulations 2023

A report of the Director of Children's Services was submitted in respect of the latest amendments to the School and Early Years Finance (England) Regulations 2023 as advised by Central Government.

The Principal Accountant presented the report and referred Members to pages 47 and 48 of the report submitted, which provided a summary of the changes concerning the National Funding Formula (NFF) calculations that had been submitted to schools.

It was reported that there were four changes, which would affect the NFF, in particular bringing the local funding formulae 10% closer to the NFF, however, it was noted that Dudley currently mirror the NFF, therefore, there would be no impact with regard to that factor.

It was advised that a new funding factor stream would need to be used, therefore, Dudley had adopted a mobility factor within the funding formula.

In referring to the Minimum Funding Guarantee (MSG), it was noted that the calculation for the MSG had been revised. The school supplementary grant had been rolled into the NFF, therefore, this would now be included within the MSG calculations.

The Principal Accountant advised that due to the lack of assessments available due to Covid 19 for the lower prior attainment factor, as per the NFF, data was being used from 2019.

Members noted that the Early Years discretionary funding cap had been increased to 12% to take into consideration the rolling out of the Teachers Pay Grant and Teachers Pension Employers Grant into the NFF. It was advised that approximately £345,000 of funding had been ringfenced and would be passed onto providers who were in receipt of the Grant for the current financial year.

Resolved

That the amendments to the School and Early Years Finance (England) Regulations 2023 effective from 14th February, 2023 relating to financial year 2023/24 only, be noted.

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

The Director of Children's Services referred to the Children's Services General Fund and in doing so advised that due to significant pressures it was anticipated that there would be an overspend, which in turn would create further challenges.

It was noted that there had been an increase in demand for support for children and families, therefore, a new model would be implemented known as the 'Family Safeguarding model'. The model would allow employees to work alongside parents to support their children, specifically focusing on mental health, substance misuse and domestic abuse. As a result of the new model, it was noted that there would be a restructure within the Children's Services Directorate.

It was advised that resulting from the Department for Education (DfE) support and supervision process within children's social care the DfE had recommended to Ministers that good progress had been made and sufficient plans implemented and that the Minister had accepted the recommendation.

Resolved

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

The meeting ended at 6.40pm

CHAIR

Dudley Schools Forum – 20th June, 2023

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 1st May, 2023.

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 1st May, 2023, 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 one primary school governor, one secondary school

governor, six academy members and one non-school member representatives, the outcomes of which are detailed below:

School Member – Primary School Governor

6. Following one nomination Mrs Jill Belcher (Peters Hill Primary School) will continue in post as Primary School Governor Representative for a three year term of office to 30th April 2026.

School Member – Secondary School Governor

7. Following one nomination Mrs Susan Watson (Summerhill School) will continue in post as Secondary School Governor Representative for a three year term of office to 30th April 2026.

Academy Members

8. Following the receipt of six nominations across Dudley academies, the following Academy Member Representatives have been appointed for a three year term of office to 30th April 2026:
 - Mr Chris Finnerty (DRB-Ignite Multi-Academy Trust);
 - Ms Jo Higgins (Dudley Academy Trust);
 - Mr Kevin Tranter (Dudley Academy Trust);
 - Mrs Rebecca Cox (Hales Valley Academy Trust);
 - Mrs Eve Stanton (Invictus Education Trust);
 - Mr Alex Webb (Windsor Academy Trust).

Non School Member – Dudley 16-19 FE Providers

9. Following one nomination Mrs Joanne Williams (Interim Principal, Halesowen College) will continue in post as the Dudley 16-19 FE Provider Representative for a three year term of office to 30th April 2026.

Current Vacancies

10. Following the recent resignations received from Mr D Mcnaney (Academy Member Representative) and Mrs A Clarke (Primary School Governor), the vacancies will remain until the next elections process was undertaken in Autumn, 2023.

Budget Working Group

11. This report has been considered by the Budget Working Group on 13th June, 2023.

Finance

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

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 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.
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.

Environment/Climate Change

19. This report has no direct implications on the environment or the Council's work in addressing Climate Change and achieving Net Zero target by 2041.

Council Priorities and Projects

20. 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:

Gemma Gray
Democratic Services Officer
Telephone: 01384 815334
Email: gemma.gray@dudley.gov.uk

Appendices

Appendix 1 – School Forum Membership from 1st May, 2023

		Headteachers 3 year term of office					
<u>DUDLEY SCHOOLS FORUM CONSTITUTION</u>		1 May 2021 to 30 April 2024	1 May 2022 to 30 April 2025	1 May 2023 to 30 April 2026	1 November 2020 to 31 October 2023	1 November 2021 to 31 October 2024	1 November 2022 to 31 October 2025
SCHOOL MEMBERS							
Nursery School Headteachers	One nursery headteacher						
Netherton Park Nursery	Miss A Ward, Netherton Park Nursery School, Netherton, Dudley DY2 9QF						√
Primary School Headteachers	Four primary school headteachers from any of the five townships						
Brierley Hill	Ms Lisa Maskell, Dawley Brook Primary School, Dubarry Avenue, Valley Fields, Kingswinford, West Midlands, DY6 9BP						√
Halesowen	Mrs C Finnegan, Our Lady and St Kenelm RC Primary School, 2 Bundle Hill, Halesowen, B63 4AR					√	
North Dudley	Mrs S Parkes, Wren's Nest Primary School, Marigold Crescent, Dudley, DY1 3NX						√
Stourbridge	Mrs A Hannaway , Headteacher, Gigmill Primary, The Broadway, Norton, DY8 3HL.				√		
Primary School Governors	Four primary school governors from any of the five townships						
Brierley Hill	Mr B Roe, Crestwood Park Primary School, Lapwood Avenue, Crestwood Park Estate, Kingswinford, DY6 8RP.		√				
Dudley	Vacancy	√					
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	√					
Secondary School Headteachers	One secondary school headteacher from any of the five townships						
Brierley Hill	Mr T Harris, Headteacher, Summerhill School, Lodge Lane, Kingswinford, West Midlands, DY6 9XE						√
Secondary School Governors	One secondary school governor from any of the five townships						
Brierley Hill	Mrs S Watson, Summerhill School, Lodge Lane, Kingswinford, West Midlands, DY6 9XE			√			
Special School Headteacher	One special school headteacher for all townships						
All townships	Miss J Colbourne, Headteacher, Old Park School, Thorns Road, Brierley Hill, DY5 2JY					√	
Special School Governor	One special school governor for all townships						
All townships	Mr P Leyshon - Pensmeadow & Rosewood School	√					
ACADEMY MEMBER							

<u>DUDLEY SCHOOLS FORUM CONSTITUTION</u>		1 May 2021 to 30 April 2024	1 May 2022 to 30 April 2025	1 May 2023 to 30 April 2026	1 November 2020 to 31 October 2023	1 November 2021 to 31 October 2024	1 November 2022 to 31 October 2025
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	Mr M Kelay, Headteacher, Thorns Collegiate Academy (Shirelands Collegiate Trust)	√					
1 Representative	Vacancy	√					
1 Representative	Mr S Lanckham, Head Teacher, Windsor High School and Sixth Form (Windsor Academy Trust)	√					
1 Representative	Mr A Webb (Windsor Academy Trust)			√			
<u>Pupil Referral Units</u>							
All PRUs	Mrs V Howard, Headteacher, Cherry Tree Learning Centre (PRU)					√	
<u>NON SCHOOL MEMBERS</u>							
<u>Representatives from Bodies Approved By Schools Forum</u>							
Unions and Professional Associations, nominated by the staff side of the Directorate Joint Consultative Committee	Ms A Middleton, Dudley Branch Secretary (National Association of Head Teachers (NAHT))		√				
Worcester Diocesan Board of Education, nominated by the Board	Mr T Reid, Diocesan Deputy Director of Education	√					
Early Years Provider Reference Group, nominated by the Group	Mrs E O'Brien, Childminder.	√					
Dudley 16-19 FE Providers	Mrs J Williams, Interim Principal and CEO, Halesowen College			√			

Dudley Schools Forum – 20th June, 2023

Report of the Director of Children’s Services

Schools Forum Proposed Meetings and Forward Plan for the 2023/24 Academic Year

Purpose

1. To provide Schools Forum with a schedule of proposed meeting dates and Forward Plan for the 2023/24 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 2023/24 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 2022/23 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. Following approval at a previous meeting, 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 2023/24 Academic Year

Schools Forum Meeting	Venue
3 rd October 2023	Microsoft Teams
14 th November 2023	Microsoft Teams
16 th January 2024	Microsoft Teams
27 th February 2024	Microsoft Teams
16 th April 2024	Microsoft Teams
25 th June 2024	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 2023/24 academic year.

Schools Forum Training

9. A workshop to provide Schools Forum training will be arranged for September 2023 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 13th June, 2023.

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.

Environment/Climate Change

19. This report has no direct implications on the environment or the Council's work in addressing Climate Change and achieving Net Zero target by 2041.

Council Priorities and Projects

20. 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:

Gemma Gray
Democratic Services Officer
Telephone: 01384 815334
Email: Gemma.gray@dudley.gov.uk

Appendices

Appendix 1 – Proposed Meetings and Forward Plan for the 2023/24
Academic Year

DRAFT SCHOOLS FORUM – MEETING SCHEDULE 2023/24

Date of meeting (Venue)	Items to be considered		
Tuesday 3rd October, 2023	<ul style="list-style-type: none"> • Election of Chair for the 2023/24 Academic Year • Appointment of Vice-Chair for the 2023/24 Academic Year • Head Teachers Consultative Forum – Budget Working Group Verbal Feedback • SF Membership Update – Headteachers elections • Growth Fund Methodology 2024/25 • Trade Union Facility Time – Pooled Funding Arrangement • Directorate of Children’s Services Verbal Update 	Microsoft Teams	6pm
Tuesday 14th November, 2023	<ul style="list-style-type: none"> • Head Teachers Consultative Forum – Budget Working Group Verbal Feedback • SF membership Headteachers elections result • Dedicated Schools Grant Projected Outturn Update 2023/24 • Dedicated Schools Grant – Schools Specific Contingency Reserves • De-delegated Service Options for 2024/25 • Dudley’s Scheme for Financing Schools 2023/24 • Delivering Better Value in SEND • Directorate of Children’s Services Verbal Update 	Microsoft Teams	6pm
Tuesday 16th January, 2024	<ul style="list-style-type: none"> • Head Teachers Consultative Forum – Budget Working Group Verbal Feedback • SF membership update (if required) • Dedicated School Grant Budget Process 2024/25 • Pupil Growth Fund 2023/24 and 2024/25 • Delivering Better Value in SEND • Directorate of Children’s Services Verbal Update 	Microsoft Teams	6pm

Tuesday 27th February, 2024	<ul style="list-style-type: none"> • Head Teachers Consultative Forum – Budget Working Group Verbal Feedback • SF membership update – Spring Elections Process • Early Years Single Funding Formula and Early Years Inclusion Funding Arrangements and Proposed Changes for 2024/25 • Dedicated Schools Grant Stage 2 Budget Planning – Centrally Retained Service Approvals 2024/25 • Delivering Better Value in SEND • Directorate of Children’s Services Verbal Update 	Microsoft Teams	6pm
Tuesday 16th April, 2024	<ul style="list-style-type: none"> • Head Teachers Consultative Forum – Budget Working Group Verbal Feedback • SF membership update – Spring Elections results verbal update • Dedicated Schools Grant Budget Process 2024/25 – Final Update • Dedicated Schools Grant Projected Outturn Update 2023/24 • School and Early Years Finance (England) Regulations 2024 • Directorate of Children’s Services Verbal Update 	Microsoft Teams	6pm
Tuesday 25th June, 2024	<ul style="list-style-type: none"> • Head Teachers Consultative Forum – Budget Working Group Verbal Feedback • SF Membership Spring Elections Results • Proposed agenda and meeting schedule date 2024/25 Academic Year • Combined Services outturn 2023/24 • Dedicated Schools Grant outturn 2023/24 to include school reserves and licensed deficits • Dedicated Schools Grant – School Specific Contingency Reserves 2023/24 and 2024/25 • Delivering Better Value in SEND • Directorate of Childrens Services Verbal Update 		

HTCF-BWG MEETING SCHEDULE 2023/24 ACADEMIC YEAR

HTCF-BWG Meeting (Representative Head teachers)	Time	Venue
26 th September 2023	8.30 – 10.30	MS Teams
7 th November 2023	8.30 – 10.30	MS Teams
9 th January 2023	8.30 – 10.30	MS Teams
20 th February 2023	8.30 – 10.30	MS Teams
9 th April 2023	8.30 – 10.30	MS Teams
18 th June 2023	8.30 – 10.30	MS Teams

Dudley Schools Forum – 20th June 2023

Report of the Director of Children’s Services

Combined Services Budget Outturn 2022/23

Purpose

1. To provide Schools Forum with financial data and service provider information in respect of the Combined Services Budget for the 2022/23 financial year ended 31 March 2023.

Schools Forum Role and Responsibilities

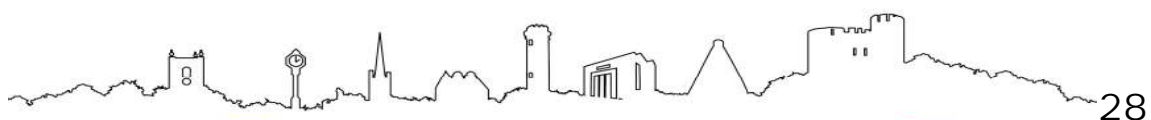
2. The Forum is the ‘guardian’ of the local Schools Budget, and its distribution among schools and other bodies, and therefore must be closely involved throughout the development process.

Recommendation

3. Schools Forum to note the report in respect of the Combined Services budget outturn for 2022/23.

Background

4. The Dedicated Schools Grant (DSG) funds the Schools Budget. The Schools Budget is a combination of centrally retained budgets together with the ISB (Individual Schools Budget).
5. The DSG is a ring-fenced grant and 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.
6. The School Funding Regulations include a provision for “Combined Budgets” under the types of funding that can be retained centrally from the DSG. Prior to 2013/14 it was conditional that the Schools Forum agreed the amounts involved and ensured that there is an educational benefit to the pupils.



7. From 2013/14, in line with the School Funding Reforms, any budget deductions under the Combined Budget provision must not exceed the amount deducted for the previous funding period. This means that no new Combined Budgets can be allowed and existing funding must be constrained in value to the budget set aside in the previous funding period.
8. For 2022/23 Schools Forum has exercised its authority to allocate central funds for:
 - a. Astley Burf Outdoor Activity Centre
 - b. School Visits
 - c. Education Liaison
 - d. Place Planning
 - e. Safeguarding
 - f. Statistical Work
9. Table 1 details the 2022/23 actual expenditure, against a budget of £182,000. Owing to the reduction in the Central School Services Block DSG allocation for 2023/24, these Combined Budgets are ceasing at the end of 2022/23. The narrative in the table below indicates, as well as the spend in 2022/23, the service proposals for 2023/24 and future years.

Table 1 – 2022/23 Final Outturn for the Approved Combined Budgets

Details	2022/23 DSG Outturn £	Description of Provision
Astley Burf Outdoor Activity Centre	12,000	Astley Burf is the outdoor adventure centre owned and run by Dudley Council for the children of Dudley, offering both residential and day visits for schools and children’s groups. Although it has been impacted by the pandemic, a new commercial business plan has been developed to reinvigorate the centre and drive up school awareness, interest, bookings and usage. From 2023/24 onwards, it is expected that the provision will be self-financing.

School Visits	10,000	A traded service to support advice and guidance on School Visits has been developed and it is envisaged that this will be self-funding from 2023/24.
Education Liaison	44,000	<p>This allocation has provided funding for an Education Liaison Officer to support schools with their safeguarding remit, including the following duties:</p> <p>Good understanding of the role of DSL and safeguarding/CP within schools and EY settings</p> <p>Attendance at DART meetings daily and action any tasks to update schools/Early Years setting</p> <p>Operation Encompass – daily admin, contact Schools & Early Years with notifications and liaise with DSLs to discuss pastoral support with child/YP</p> <p>Complete MASH checks with Schools/Early Years settings/CME team/EHE & GRT/Education Admissions (Synergy/Tribal)</p> <p>Engage with schools/Early Years settings and support with threshold pathway and referral process</p> <p>Collate and present accurate data from DART/Op Encompass/MARAC referrals, themes trends, etc. to SERG and DSL Forum and DSPP.</p> <p>From 2023/24, this post will be funded from core budgets and income from the traded service for school safeguarding training.</p>
Place Planning	40,000	The budget for place planning has supported staff in the Integrated Commissioning Hub. The current reorganisation of the Commissioning

		Service will rationalise service provision and increase efficiencies.
Safeguarding	42,000	The safeguarding training role will continue and will be provided as a traded service as previously proposed.
Statistical Work	34,000	The budget for statistical work has supported staff in the Integrated Commissioning Hub. The current reorganisation of the Commissioning Service will rationalise service provision and increase efficiencies.
Total	182,000	

HTCF - Budget Working Group Discussed – Yes – 13 June 2023.

Finance

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

Law

11. 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, 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

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

Equality Impact

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

Human Resources / Organisational Development

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

Commercial/Procurement

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

Environment / Climate Change

16. This report has no direct implications on the environment or the Council's work in addressing Climate and achieving Net Zero target by 2041.

Council Priorities and Projects

17. 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.



Catherine Driscoll
Director of Children's Services

Contact Officer:

James Wilson – Senior Principal Accountant

Telephone: 01384 815864

Email: james.wilson@dudley.gov.uk

Dudley Schools Forum – 20th June 2023

Report of the Director of Children’s Services

Dedicated Schools Grant Outturn and School Reserves 2022/23

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 2022/23 financial year ended 31 March 2023.

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 2022/23 DSG Outturn and DSG Accumulated Reserve which are detailed at Appendix A and Appendix B of this report.
4. Schools Forum to note the 2022/23 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 2022/23 will commence in July 2023.

DSG Outturn for 2022/23

9. For the 2022/23 financial year the DSG was £301.299m. Of this allocation £131.894m was payable by the Education and Skills Funding Agency directly to Dudley's 47 Primary and Secondary Academy Schools giving Dudley a net DSG of £169.405m. Business rates for both maintained and academy schools are included within this at a total of £2.406m, 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 £169.405m was allocated:
 - a. Centrally retained budget areas £47.127m, assuming an in year deficit of £5.464m would be carried forward via the DSG Adjustment Account.
 - b. De delegated budget of £0.256m
 - c. Maintained School's delegated budgets and funding for the early years provision, in both the maintained and independent sector of £125.080m.
 - d. Business Rates of £2.406m
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 2022/23 the DSG cumulative deficit of £23.317m will be held in the DSG Adjustment Account: this includes the deficit brought forward from 2021/22 of £18.134m. 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 2023, the reserve closed with a surplus balance of £1.237m. Table 1 below summarises the reserve position at year end.

Table 1 – Central DSG Reserve Summary

	Central DSG Reserve	School Specific Contingency Reserve	Total Reserve
	£ m	£m	£m
Cumulative roll forward DSG reserve Available at 1/4/2022	(18.134)	0.915	(17.219)
Less net expenditure in 2022/23 <i>(details Appendix B)</i>	(5.183)	0.322	(4.861)
Accumulated carry forward balance to 2023/24	(23.317)	1.237	(22.080)

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 £10.164m at 1 April 2022 and the movement to the closing position of £7.593m at 31 March 2023.

Table 2 – School Reserve Balances from Delegated Budgets

Reserve Type	2022/23 Opening Balance	Adj. for Academies	Net addition to / (Use of) Reserves	2022/23 Closing Balance
	£m	£m	£m	£m
Specific Contingency	6.670	(0.289)	(0.925)	5.456
Covid Catch Up Grant	0.274	0	(0.274)	0.000
Boarding Capital Projects	1.559	0	0.016	1.575
LA Capital Projects	1.788	0	(0.835)	0.953

Approved Capital Loans	(0.046)	0	(0.085)	(0.131)
Approved Licensed Deficits	0	0	0	0
Reserves to Balance Budget/ Deficit Budgets	(0.081)	0	(0.178)	(0.259)
	10.164	(0.289)	(2.281)	7.593

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

Table 3 – Movement in School Reserves

	£ m
Opening balances at 1/4/2022	10.164
Reserves utilised by maintained schools during 2022/23	(4.844)
Additions to Reserves during 2022/23	0.899
In year surplus balances for schools at 31 March 2023 (added to reserves)	1.964
Covid catch up grant reserve	(0.275)
In year deficits for schools	(0.330)
Loan repayments	0.015
Closing balance at 31/03/2023	7.593

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

Reserve Type	2022/23 Opening Balance	Adj. for Academies	Net Increase in Reserves	2022/23 Closing Balance
	£m	£m	£m	£m
School Trading Accounts	1.997	(0.048)	(0.018)	1.931

23. The Scheme for Financing Schools provides detail of the Local Authority Balance Control Mechanism (BCM) which gives the Director of Children’s Services and Young People 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 and Young People may claw back the excess amount.

24. At 31 March 2023 six schools held balances greater than those permitted within the Balance Control Mechanism. The value of these reserves is £0.084m. It has been determined by the Director of Children's Services and Young People and the Service Director for Early Help, Schools & SEND that these surplus reserves will not be removed from the schools and retained centrally.
25. Two schools set aside reserves to balance their 2022/23 budget. The value of these reserves is £0.110m. It has been determined by the Director of Children's Services and Young People and the Service Director for Early Help, Schools & SEND that these surplus reserves will not be removed from the schools and retained centrally.
26. At 31 March 2023 four 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 2023/24 school budget in the first instance. The Local Authority is working with these schools to balance its budget in 2023/24.
27. During 2022/23 no schools operated with a Licensed Deficit.

HTCF - Budget Working Group Discussed

28. Yes – 13 June 2023.

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, 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.

Environment / Climate Change

36. This report has no direct implications on the environment or the Council's work in addressing Climate and achieving Net Zero target by 2041.

Council Priorities and Projects

37. The 2022/25 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.



Catherine Driscoll
Director of Children's Services

Contact Officer:
James Wilson
Senior Principal Accountant – Financial Services

Telephone: 01384 815684

Email: james.wilson@dudley.gov.uk

Background Papers

Appendix A – Dedicated Schools Grant Outturn Statement 2022/23 – as at 31 March 2023.

Appendix B – Dedicated Schools Grant Accumulated Reserve – as at 31 March 2023.

Dedicated Schools Grant Outturn 2022/23

Appendix A

Directorate of Children's Services DSG Budgets	2022/23 DSG Latest Budget £m	2022/23 DSG Forecast Outturn £m	2022/23 Variance () = under spend £m	Comments
Individual Schools Budget (ISB)	125.080	125.080	0*	*Schools can roll-forward any under spend (Nursery, Primary, Secondary & Special) Dudley 6 th form school - OSH
Post 16 pupils - 6 th Form Funding	1.064	1.064	0	
De- Delegated Budgets	0.256	0.210	(0.046)	Staffing savings relating to union duties
Centrally Retained Budgets	47.127	46.892	(0.235)	Significant pressures resulting from increased demand of Education Health and Care Plans. Includes savings from Early Years Block, though these are as a result of lagged funding allocations rather than actual underspending, and Central School Services Block.
Education Funding Agency (ESFA) 6 th form grant	(1.064)	(1.064)	0	Oldswinford Hospital School
Use of DSG Reserve	(5.464)	18.134	23.598	Budgeted deficit of £5.464m for 2022/23 and B/fwd deficit position of £18.134m on Central DSG reserve for prior years.
Total DSG payable to Dudley 2022/23	166.999	190.316	23.317	
Academy Schools Funding paid to School via ESFA	131.894	131.894	0	Allocated to Academy Schools directly via the Education & Skills Funding Agency 47 schools at 31 March 2023

Business Rates Allocation	2.406	2.406	0	Centralised business rates for maintained schools and academies – note new system from 2022/23
Total DSG 2022/23	301.299	324.616	23.317	

Centrally Retained Dedicated Schools Grant Reserve Expenditure

Reserve Category	Opening Balance as at 01/04/22 £m	Additions to Reserves in Year £m	Use in Year £m	Net Use of Reserves £m	Closing Balance as at 31/03/23 £m
<u>Central DSG Reserve</u>					
High Needs Block	(20.708)		(5.968)	(5.968)	(26.676)
Early Years Block	2.039	0.950		0.950	2.989
Central School Services Block	0.535		(0.165)	(0.165)	0.370
Total Central DSG Reserve	(18.134)	0.950	(6.133)	(5.183)	(23.317)
School Specific Contingency					
Rates Adjustments			(0.045)	(0.045)	
Professional Development Programme Grant – ring fenced			(0.091)	(0.091)	
Schools income – ring fenced		0.141	(0.006)	0.135	
De delegations – Union Duties (Ring fenced)		0.046		0.046	
Transfer to reserves – Growth Fund		0.277		0.277	
Total School Specific Contingency Reserve	0.915	0.464	(0.142)	0.322	1.237
Total DSG Reserve	(17.219)	1.414	(6.275)	(4.861)	(22.080)

Schools Forum – 20 June 2023

Report of the Director of Children’s Services

Delivering Best Value (DBV) in SEND Update

Purpose

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

Recommendations

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

Background

3. In 2022 Dudley was identified as 1 of 55 Local Authorities with a significant overspend of its High Needs Block and was invited to engage with Round One of the national Delivering Best Value in SEND programme, given that High Needs Block (HNB), spending has been increasing by 9% annually over the last 5 years
 - Mainstream = 36% of total – 7% annual growth
 - INMSS = 21% of total - 21% annual growth
 - Post 16 = 11% of total – 17% annual growth.

NB: 32% of total (made up of Resource Base, AP, Therapy Services, Other Support, etc.)

4. During the latter part of 2022, Newton Europe, commissioned directly via the Department for Education (DfE), undertook a deep dive analysis into Dudley’s data to understand the local system and understand the impact on High Needs Block spend.
5. Throughout the modules undertaken as part of the DBV programme initiated by DFE, 3 key areas were identified that are putting increasing pressure on the High Needs block. These being:
 - Increasing demand for specialist education provision (annual increase 23%)
 - Increasing demand for new EHCPs (over 20% per year, is now in line with National at 10% per year)
 - Increasing demand in EHCPs for YP aged between 19 and 25 (annual increase 25% and reduced capacity to end EHCPs for YP aged 19 to 25)
6. In responding to these areas key workstreams were established to respond to the Newton Europe findings, these being:
 1. Sufficient cost effective local provision
 2. Earlier identification and intervention so that SEN is appropriately met at SEN Support
 3. Commissioning of cost effective and appropriate provision to support transition into adulthood

Activity to date

7. Table one details activity that has been undertaken (some of which was planned prior to the Newton Europe diagnostic activity) within each key workstream.

Table 1 – DBV Development Activity

Workstream 1 – Sufficient cost-effective local provision	
Activity to Date	Next Steps

<p>Extension of current base provision to:</p> <ul style="list-style-type: none"> • support children able to access a mainstream curriculum but who require enhanced support to access mainstream environment • Provide positive opportunities for children struggling to access mainstream curriculum but who will benefit from the mainstream environment <p>Restructure of Specialist Early Years Service to Integrated Early Years Service</p> <p>Review of health notification system</p> <p>Development of Pens Meadow School planned opening date Sept 24</p> <p>Targeted review of capacity with current specialist settings undertaken by external provider</p>	<p>Discussions with Dudley maintained special schools to ensure that there is capacity for 23/24 cohort this has been enabled by ensuring that requests for EHC needs assessment for children with complex needs have been received without unnecessary delay.</p> <p>5 and 10 year sufficiency strategy to be developed so that we are in a better position to plan effectively into the future.</p> <p>Enhance our MI and data capability to have clear understanding and oversight of future demand alongside in-depth understanding of need and so that we can develop capacity locally based on agreed priorities across all partners</p>
<p>Workstream 2– Earlier identification and intervention so that SEN is appropriately met at SEN Support</p>	
<p>Activity to Date</p>	<p>Next Steps</p>
<p>Children’s Services Redesign</p> <ul style="list-style-type: none"> • Phase 1 (started) includes development of Family Safeguarding model and Family Hubs development, designed to provide high quality support as early as possible. Phase 2 (Autumn 2023) will include Education Services and SEND services, 	<p>Review of specialist education services alongside review of jointly commissioned services including what we commission and impact</p>

<p>and will enable specialist education services to provide early support to schools and will support schools to provide earlier support to children</p> <p>SEND lead practitioner role in post</p> <p>Development of localised assessment centres starting</p> <p>Robust panel processes to support multi agency decision making and to provide intelligence to better understand how SEN Support is being delivered within mainstream schools</p>	<p>SEND monitoring to be established across the borough</p> <p>Transition to school: Plans progressing to introduce targeted training, support and transition funding for children due to start mainstream schools as part of the Integrated Early Years Service</p> <p>Improved phase transition support</p>
<p>Workstream 3– Commissioning of cost effective and appropriate provision to support transition into adulthood</p>	
<p>Activity to Date</p>	<p>Next Steps</p>
<p>Preparation For Adulthood (PFA) strategy in place.</p> <p>Review of local provision, working practice and commissioning including personalised commissioning</p> <p>Improved communication across the partnership</p> <p>DSCO role appointed and in place and will support stronger pathways for children/YP</p> <p>Transition annual reviews to inform and be informed by annual health checks</p> <p>Review of EHCP outcomes to support PFA</p>	<p>Joint commissioning of social care services</p> <p>Multi agency events, in conjunction with parent carers and young people</p>

Deep dive activity into EHCPs has identified that EHCPs are for this age group are not appropriate	
--	--

8. As part of our continuing engagement with the DfE, we have secured grant funding of £1m to support the ongoing development and initial delivery of the DVB programme outcomes.
9. We are currently in the process of securing a delivery partner to work with us in moving this activity forward (this may include Newton Europe although we are also seeking delivery support propositions from other similar agencies)

Finance

10. Grant funding of £1m from DfE will support the ongoing development and initial delivery of the DVB programme outcomes. 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 2022/23, the local authority has a deficit balance on the DSG (High Needs Block) of £26.676m. The Delivering Better Value in SEND 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

11. 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 2022.

Risk Management

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

Equality Impact

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

Human Resources/Organisational Development

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

Commercial/Procurement

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

Environment / Climate Change

16. This report has no direct implications on the environment or the Council's work in addressing Climate and achieving Net Zero target by 2041.

Council Priorities and Projects

17. 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.

Catherine Smith

Catherine Driscoll
Director of Children's Services

Contact Officers:

Susan Powell, Head of SEND

Telephone: 01384 816276

Email: susan.powell@dudley.gov.uk

Catherine Ludwig, Finance Manager

Telephone: 01384 815075

Email: catherine.ludwig@dudley.gov.uk

