

## SCHOOLS FORUM

*At a meeting of the Schools Forum on Wednesday, 19 June 2024 held remotely*

Present: Councillor T. McInerney, Observer  
A. Jones, Democratic Services, HBC  
N. Shafiq, Financial Management, HBC  
B. Holmes, Education, Inclusion and Provision  
C. Finch, SEND Policy, People, Performance & Efficiency  
C. Elechi, Financial Management, HBC  
J. Jardine, All Through School Representative  
K. Evans, Secondary Academy with a 6th Form Representative  
M. Tudor, Secondary Academy Representative  
J. O'Connor, PVI Representative  
J. Coughlan, Primary Representative - Infant School  
J. Wilson, (Vice Chair in the Chair) Secondary Governor Representative  
E. Haver, Special Academy Representative  
J. Thompson, Community Special Schools  
C. Liku, Community Nursery Schools Representative  
J. Robertson, Small Primary School Representative  
R. Houghton, Community Primary Governor Representative  
B. Barton, 16-19 Provision

*Action*

### SCF1 APOLOGIES FOR ABSENCE

Apologies had been received from Karl Landrum – Primary School with a Nursery Representative; Nigel Hunt – PRU Representative; and Matty Deeney – Secondary Academy Representative.

### SCF2 ELECTION OF THE CHAIR

Mr Karl Landrum stepped down as Chair of the Forum in May 2024. A replacement was canvassed for and Mr Nigel Hunt had volunteered and requested to be considered for the role. No other nominations were received.

The Forum voted unanimously to support Mr Hunt's nomination and he was elected as Chair with immediate effect, for an initial period of two years.

RESOLVED: That Nigel Hunt is elected as Chair of the Schools Forum from June 2024.

### SCF3 MINUTES

The minutes of the meeting held on 21 February 2024

were agreed as a correct record.

Representatives the possibility of returning to face to face meetings, as the consensus was that these would be preferred going forward.

Officers would contact Education and Skills Funding Agency (ESFA) to check this was acceptable but it was thought that it was up to the Forum to decide how its meetings were conducted.

#### SCF4 MEMBERSHIP UPDATE

The Forum received an update on the Membership of the Forum, which explained recent recruitment activity for vacancies that existed.

Officers advised that two expressions of interest had now been received for the Primary Academy Representative, so one would be appointed before the end of term.

RESOLVED: That the update is noted.

#### SCF5 DSG OUTTURN 2023-24

The Forum received a report from the Director of Finance, which presented the Dedicated Schools Grant (DSG) final outturn for 2023-24.

It was reported that the final amount of DSG allocated to Halton for 2023-24 was £143,393,022, which was broken down as follows:

Schools Block	-	£106,745,453
CSSB	-	£737,941
Early Years Block	-	£9,774,577
High Needs Block	-	£26,135,051

The report gave details of the expenditure within each of the blocks and Representatives were referred to Appendix A, which gave a more detailed analysis of the 2023-24 final DSG outturn.

It was noted that overall, the DSG for 2023-24 had overspent by £2,455,961. Taking into consideration the carry forward deficit balance of £2,892,585 from the previous financial year, there is a total DSG deficit of £5,348,546 to be carried forward into 2024-25.

Additional information was provided following discussions:

- Nationally, the SEND deficit was now £1b and Halton had the 12<sup>th</sup> highest growth rate of EHCP's in the Country;
- The DBV (Delivering Better Values) Programme was introduced by the DfE to alleviate pressure on High Needs and Halton had been awarded £1m after bidding for funding;
- The DBV Programme had a positive response from schools and it was hoped that the projects within the Programme would support schools to continue to be more inclusive;
- The DBV funding was welcomed, however, the DfE was advised that £1m would not be enough to have an impact on the budget deficit and that a long-term plan would be needed;
- How the DBV money was being spent was closely monitored by the DfE and quarterly meetings were held with them. It was not thought that the funding would be withdrawn if not spent within a certain amount of time, but this would be checked;
- Schools had responded positively to the DBV Programme and there was a lot of interest; 19 had started DBV projects last week;
- An element of the DBV Programme included training schools' staff to deal with behavioural problems positively with the student. This was new territory for all and an attempt to do something different, in order to support schools who were struggling with the increasing numbers of SEND pupils. In relation to Out of Borough placements, it was predicted that these would eventually be reduced if the DBV Programme proved to be successful;
- Also, increased SEND provision in the Borough would begin to offset Out of Borough places naturally and it was reported that more schools were coming forward to offer more provision;
- Local authorities all over the country were struggling to fund High Needs and in Halton, it was felt that the DBV Programme alone would not solve the problem;
- One Representative gave an example of a resource base in one school that was under used and queried why – it was commented that some schools refused children with more complex needs, although information relating to this particular school was not at hand; and
- The under use of resource bases was a concern, as there was a risk of losing SEND places to other local

authorities, who were entitled to take places as their own Out of Borough provision.

RESOLVED: That Schools Forum note:

- 1) the overall deficit balance of DSG from 2023-24 of £5,348,546 is carried forward into the 2024-25 financial year; and
- 2) the continuing pressures resulting in an in-year overspend on the High Needs Block of £2,538,695.

#### SCF6 SCHOOLS BALANCES 2023-24

The Schools Forum considered a report from the Director of Finance, which gave the level of Revenue and Devolved Formula Capital (DFC) funding brought forward from 2023-24 by Halton's maintained schools.

It was noted that whilst balances were still required to be reported to the Schools Forum, no excess surplus balance limits were currently in place. Schools Forum however, retained the right to require schools to provide further information as to how their balance would be spent, should they so decide.

Appendix A showed the revenue balance for each maintained school, along with their 2022-23 balance for comparison. Overall, Halton's net surplus school budget balance position for maintained schools was £6,519,071, at the end of 2023-24. The report summarised comparisons with the previous year's balances.

Appendix B showed the Devolved Formula Capital (DFC) balances for each maintained school, along with their 2023-24 balance for comparison.

It was noted that 19 schools carried over a balance that was surplus to the Ofsted recommended thresholds (5% primary or 8% secondary). It was confirmed that the requirement to 'clawback' excess funds had been removed. If a school has an excessive surplus balance, the Forum can request information from the school on what the money would be used for. The reinstatement of the clawback policy would be explored and comparisons made with the use of this in other authorities. There were concerns that some schools had excess surplus balance carry overs year on year, so it was suggested that some clarity on those would be helpful.

Director of  
Finance

RESOLVED: That the report is noted.

SCF7 HALTON SCHEME FOR FINANCING SCHOOLS UPDATE

The Forum was presented with the latest version of the Halton Scheme for Financing Schools (SFFS), applicable to maintained schools only, as updated for 2024.

Director of  
Finance

It was noted that there were no directed revisions issued by the DfE since Schools' Forum last approved the Scheme for Financing Schools for 2021.

The updates described in paragraphs 3.3 and 3.4 were noted.

RESOLVED: That Schools Forum

- 1) note any updates approved; and
- 2) agree to the latest version being made available, as statutorily required, to all maintained schools and on a website accessible for public inspections.

*Meeting ended at 4.50 p.m.*