

Attendance

Members of Schools' Forum

Karen Preston (Chair)	Academies Sector Representative
Susan Lacey (Vice Chair)	Nursery Sector Headteacher Representative
Stephen Blower	Secondary Sector Representative
Louisa Craig	Academies Sector Representative
Ben Davis	Academies Sector Representative
Lorraine Dawney	Special School Sector Substitute
Samantha Kemp-Marshall	Non-School Member PVI Early Years Representative
Zoe Rollinson	Primary Sector Headteacher Representative
Stephen Smith	Primary Sector Governor Representative
Graham Tate	Academies Sector Representative
Lisa Thompson	Non-School Member Diocesan Schools Representative
Phil Williams	Academies Sector Representative

Observer Status

Brenda Wile	Deputy Director of Education
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In Attendance

James Barlow	Finance Business Partner
Peter Green	Finance Manager
Shelley Humphries	Democratic Services Officer
Phil Leivers	Head of Service Educational Excellence
Kully Sandhu	Observer

Part 1 – items open to the press and public

Item No. *Title*

1 **Welcome and Introductions**

2 **Apologies**

Apologies were received from Schools' Forum members Vivienne Bunce, Amarjit Cheema, Bhaksho Raj, Kirsty Banks, Lucia Jayne Turner and Lindsay Watson.

Apologies were also received from Emma Bennett and Bill Hague.

3 **Declaration of Interest or Confidentiality**

There were no declarations of interest or confidentiality.

4 **Minutes of the Previous Meeting - 16 February 2023**

Resolved:

That the minutes of the meeting of 16 February 2023 be approved as a correct record.

5 **Matters Arising**

Minute 11

In response to a query around teachers' pay awards, it was confirmed that conversations were ongoing between Finance and Education colleagues within the Council to establish a basis to make the payments. It had been hoped to top-slice and pay out to school nurseries as had happened previously however on closer inspection, it was found it would need to be paid on a supplement basis. Further information was awaited on how this would be implemented before making a decision and an update would be provided once available.

In response to another query, it was confirmed that as per the arrangement outlined in the Scheme for Financing Schools, the LA still paid interest to maintained schools and nurseries on surplus balances attached to a school. Interest was not currently charged on deficit balances. The current Early Years balance was not attached to specific schools, although grant balances were typically spent in-year and this occurrence was unusual. Once the funds were allocated to specific settings, these would then gain interest in the usual way.

6 **Schools' Forum Membership and Attendance Update**

Shelley Humphries, Democratic Services Officer provided a verbal update on Schools' Forum membership and attendance. It was noted all terms coming to an end were being reviewed and the usual steps were being taken to fill vacancies.

It was also requested to undertake a review of members who had not attended three consecutive meetings without a substitute.

It was noted that Schools' Forum members Sarah Whittington, Amarjit Cheema and Daryl Asbury would be stepping down and Carroll McNally would be retiring at the end of August. The Chair expressed thanks to all for their contributions to Schools' Forum during their respective terms. It was agreed to establish who would be chairing the High Needs Subgroup going forward.

It was also reported that Special School Headteacher Substitute Lorraine Dawney would be moving into the Representative role, whilst Laura Thackaberry would be joining Schools' Forum as the Special School Headteacher Substitute.

In terms of vacancies, a discussion followed around how to promote and raise awareness of Schools' Forum and its functions to governors and headteachers during which it was suggested to communicate vacancies in bulletins and to add a Schools' Forum overview to headteachers inductions. It was considered how to widen the scope of the Forum and involve other officers to offer further perspective.

Resolved:

1. That a review be undertaken of Schools' Forum attendance.
2. That an update be provided on the new Chair arrangements for High Needs Sub-Group.
3. That methods of raising awareness with education colleagues of Schools' Forum and its functions be explored.

7 **Schools' Forum Forward Plan 2023 - 2024**

The Chair presented the Schools' Forum Forward Plan 2023 – 2024 and highlighted future agenda items.

Schools' Forum members were invited to suggest any items they wished to receive at future meetings by contacting either Bill Hague, Head of School Business and Support Services or Shelley Humphries, Democratic Services Officer.

Resolved:

- That the Schools' Forum Forward Plan 2023 – 2024 be noted.

8 **Surplus and Deficit Budget Monitoring**

James Barlow, Finance Business Partner presented the Surplus and Deficit Budget Monitoring report and highlighted salient points. The report provided an update to Schools' Forum on the Local Authority processes of monitoring schools having or forecasting a deficit balance and schools carrying excess surplus balances as well as the balances held within Wolverhampton maintained schools as at 31 March 2023.

It was noted that surplus balances had reduced although not as much as originally forecast in budget plans. Only three schools reportedly held deficit balances at the end of 2022-2023, which was positive. 33 schools held excess surplus balances and letters were going out to schools to request plans for these surpluses.

It was highlighted that the range of surpluses seemed wide and a query was raised around why this might be. This was acknowledged and it was noted that this would be examined further and narrative provided within the next report should there be any outliers or emerging trends.

A concern was raised around schools with deficit balances and if these may affect certain schools in the future in terms of budgeting, financing staff, etc. It was noted this was beginning to show already and assurances were offered that cost pressures were being monitored by the Authority who would work with schools wherever possible to provide support.

Concerns were raised around this year's funding being spent on children in this year's cohort.

Resolved:

1. That the level of balances in maintained schools as at 31 March 2023 be noted.
2. That the approach to challenging schools around the level of their balances and their plans for those resources be noted.
3. That the monitoring and reporting methodology be noted.
4. That an analysis be undertaken of the range of surpluses and explanatory narrative incorporated into future reports.

9 **Dedicated Schools Grant Outturn 2022-2023**

James Barlow, Finance Business Partner presented the Dedicated Schools Grant Outturn 2022-2023 report and highlighted salient points. The report sought to inform Members of the Schools' Forum on the final expenditure against the Dedicated Schools Grant (DSG) in 2022-2023.

It was noted that there was still another update to follow in July 2023 from government on the Early Years block funding figures based on census figures which may potentially result in a clawback.

In terms of the High Needs block, it was highlighted that the overspend had reduced by £300,000 by the end of the year.

In terms of the additionality overspend, it was noted that the education colleagues were aware this may be the case as there was a steadily increasing number of children with EHCPs and additional needs in the City currently attending mainstream school who may need to be in a special setting. The Chair requested that members share this discussion with colleagues.

A concern was raised around the impact of inflation on future budgets and schools' balances. It was acknowledged that the current financial climate was very changeable however officers were working hard to manage Schools Block excess surplus balances, passporting as much additional funding as possible through the High Needs Block as well as the uplift to matrix banding.

A query was also raised around a rise in energy costs as a large unplanned increase had been received at one nursery and whether this had been experienced across the board or if it was just an isolated case. James Barlow, Finance Business Partner and Peter Green, Finance Manager agreed to investigate the matter and provide feedback.

Resolved:

1. That Schools' Forum note the latest 2022-2023 DSG allocation published by the Department for Education.
2. That Schools' Forum receive the report on the final outturn against the DSG in 2022-2023.
3. That the query on increased energy prices be investigated and feedback provided.

10 **Agreed Schools' Forum Meeting Formats**

The Chair led on a verbal decision item and invited Schools' Forum members to vote on the format of meeting going forward.

The options presented were either:

1. to continue to meet in the hybrid format with members mainly attending in person and the option to dial in
- or
2. to return to fully face to face with no option to dial in.

Members felt that the hybrid option often meant not all members were fully engaged and sometimes technical issues disrupted the meeting.

Following a vote, it was unanimously agreed that the meetings return to fully face to face going forward.

Resolved:

That Schools' Forum agree to return to fully face to face meetings with no option to dial in.

11 **Early Years Subgroup Update**

Phil Leivers, Head of Service Educational Excellence provided the verbal update on the Early Years Subgroup. It was reported that Susan Lacey had agreed to chair the Early Years Subgroup and there had been some interest expressed from other Schools' Forum members to join. Discussions had taken place with Subgroup members and Phil Leivers and a Terms of Reference document had been drafted. It was noted the funds had been sitting for some time therefore there was a call to determine how to allocate the funds as soon as possible.

The Chair extended thanks to all who had volunteered to participate.

Resolved:

That decisions on Early Years funding allocations be driven forward and an update provided at the next meeting of Schools' Forum.

12 **High Needs Subgroup Update**

Resolved:

That the High Needs Subgroup Update be deferred.

13 **Any Other Business**

A query was raised around a possible Early Years Supplementary Grant and if there was any update on this. It was noted that an additional Schools grant had been announced after the budget had been set, which was being passported out at school level, as well as an additional grant for Special Schools. James Barlow agreed to clarify this outside of the meeting and provide an update.

Resolved:

That James Barlow, Finance Business Partner establish what new funding was available and provide an update.

14

Dates for future meetings

Dates for future meetings were confirmed as:

- 5 October 2023
- 7 December 2023
- 25 January 2024
- 29 February 2024

The Chair closed the meeting at 17:21 pm.