

To all members of the Sunderland Schools Forum

Together for Children
Sunderland
City Hall – Level 2
Plater Way
Sunderland
SR1 3AA

Date: 09 October 2023
Our TFC-SF/ZW

Dear Colleague

SUNDERLAND SCHOOLS FORUM –MEETING FRIDAY 20 OCTOBER 2023

You are invited to attend a meeting of the Schools Forum to be held via Teams from **8.30am on Friday 20th October 2023** (and scheduled to end no later than 10.30am). The meeting will be held virtually and a Teams appointment has been circulated.

AGENDA

23/55	Review of the Effectiveness of Schools Forum •School Forum Members Only (8.30 am to 8.45 am)	
23/56	Election of Chair and Vice Chair (term of office 1 year) (deferred until the November 2023 meeting)	
23/57	Consideration of New Appointments • Academy Primary Infant & Juniors: Mrs A Bolam and Mr J Lines (Washington); Mrs L Reeves and Mrs R Whiteside (South) • Academy Secondary and All Through: Mr C Devlin	
23/58	Welcome, Introductions and Apologies	
23/59	Declarations of Interest	
23/60	Minutes of last meeting held on 6th July 2023 (attached)	
23/61	Matters Arising from the Minutes/Agreed Actions	
23/62	Feedback from Short Life Working Groups	
	• Inclusion	KR
	• Quality Assurance Processes for Service Providers	SM

23/63	Reports for Discussion and Decision	
	<ul style="list-style-type: none"> • Birth Rates – Impact on Early Years Schooling (deferred from May) (report to follow) 	AR
	<ul style="list-style-type: none"> • Budget Planning Framework 2024/2025 (report to follow) <ul style="list-style-type: none"> - School Funding Reform 	SGR
	<ul style="list-style-type: none"> • Proposal to Transfer Funds from the Schools Block to the High Needs Block 2023/24 (report to follow) 	SGR
	<ul style="list-style-type: none"> • De-delegation of Funding - Trade Union Facility Time (report to follow) 	SGR
	<ul style="list-style-type: none"> • Dedicated Schools Grant Update and Projected Outturn 2023/2024 	SGR
	<ul style="list-style-type: none"> • High Needs Bock Commissioned Places 2024/2025 (report to follow) 	KR
	<ul style="list-style-type: none"> • Foundation of Light Prevention Offer <ul style="list-style-type: none"> - <i>The Report detailing the proposal was circulated electronically and the Chair agreed the proposal based on Members responses.</i> 	KR
23/64	Any Other Business	
23/65	Date and Time of Next Meeting	
	Thursday 23 November 2023 at 8.30 am – Venue to be agreed	

Please do not hesitate to contact me if you have any queries.

Yours faithfully



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SUNDERLAND SCHOOLS FORUM

Minutes of the Meeting Held on Thursday 6th July 2023 at 8.30 am

School Forum Member Attendance Voting

Michael Hartnack - Chair	Maintained Primary – Governor
David Airey	Church of England Diocese
Sara Bainbridge	Maintained Primary - Washington
Ann Blakey	Maintained Catholic School
Andy Lewis	Teacher Associations
Mike Little	Special Academy (M)
Emma Monaghan	Academy Primary
Phil Smith	Academy Secondary - Chief Finance Officer
Donna Walker	Maintained Pupil Referral Service
Lisa Wood	Maintained Primary - North

Non-Voting

Simon Marshall	TfC Director of Education
Kimberley Richardson	TfC Strategic Service Lead - Education
Richard Cullen	TfC Strategic Lead – School Improvement and Early Years
Cllr Linda Williams	Lead Member Children's Services
Zena Wilkinson	Schools Forum Clerk

School Forum Non Member Attendance

Mark Chandler	TfC Education and Data Officer
Leigh Morris	TfC School Finance Manager
Emma Nolan	TfC Finance Business Partner

		Agreed Action
23/33	<p><u>Welcome, Introduction and Apologies</u></p> <p>MH welcomed everyone to the meeting and arranged introductions.</p> <p>Apologies for absence were submitted by JH, DO, SGR and IS.</p> <p>Apologies were also received following the meeting from: MHo and JM.</p>	
23/34	<p><u>Election of Chair and Vice Chair</u></p> <p>MH requested members to consider potential nominations for the position of Chair and Vice Chair of the School Forum for September 2023.</p> <p>SM explained that over the last three years the Schools Forum had tried to build a model of behaviour in relation to decision making, grounded on a collegiate approach for the City, based on challenges and commissioning and what was best for performance across the City. SM acknowledged that this was difficult, due to the budgetary pressures being experienced and</p>	Clerk – agenda September 23

<p>the increase in children with identified additional needs, for example special educational needs (SEN). SM explained that SEN Panels were now being scheduled across the summer holiday period which was indicative of the pressures being faced. SM advised members that at the current time 60% of cases considered at the SEN Panel were going forward with Education Health Care (EHC) plans.</p> <p>SM advised that during 2021/2022 there were 23 permanent exclusions across both primary and secondary education and the number of permanent exclusions implemented during the current academic year had exceeded 100. SM stated that he believed excellent support structures had been implemented and maintaining this level of permanent exclusions was not sustainable. SM explained that the Schools Forum role was to look at appropriate resources and this had been strategically challenging.</p> <p>SM highlighted that overall pupil numbers across the City had dipped.</p> <p>DW informed colleagues that Mr Chris Campbell (ex HMI Inspector) had been commissioned to complete a review of the Behaviour Support Service (BSS), particularly in line with exclusions and service provision. DW advised that it was felt the BSS was not fit for purpose but there was a need to identify why to enable this to be developed. SM explained that this review would culminate in an option paper which would be tabled within appropriate forums. SM shared that Mr Campbell was also being commissioned to complete a review of SEND Services.</p> <p>SM explained that consideration had been given to the constitution of the Schools Forum and membership and shared that he was hoping to be able to finalise the Schools Forum Terms of Reference and the Terms of Reference for Headteacher Cluster Group meetings.</p> <p>SM verified that the appointment of the Chair and Vice Chair would be formally considered in September 2023, explaining that the Education and Skills Funding Agency Guidance stipulated that the Chair may not be an elected member or officer of the council.</p> <p>SM highlighted that if Headteacher's did not engage in line with the Nolan Principles they were not meeting their responsibilities.</p> <p><i>MH stated that members may recall that when he was appointed as Chair this was through a nomination process and reiterated the need for members to consider potential nominations for the position of Chair and Vice Chair for September 2023.</i></p> <p>SM stated that he believed one of the advantages of the Chair of the Schools Forum being a representative Headteacher was their ability to discuss areas within other forums. SM reiterated the Schools Forum only issued guidance and there was no statutory reason why MH could not be re-appointed.</p>	<p>Members</p>
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	<p>AB shared that she had been a member of the School Forum for a number of years and had never seen political views being brought into discussions. AB explained that in terms of a Headteacher taking on the role of Chair she believed this may be difficult.</p> <p>AB advised colleagues that she was aware that some Headteacher colleagues, within larger multi academy trusts, were unable to be released to attend forums.</p>	
23/45	<p><u>Declaration of Interest</u></p> <p>There were no declarations of interest in relation to the business to be considered within the meeting.</p> <p>Members noted declarations could be made throughout the meeting, if appropriate.</p>	
23/46	<p><u>Minutes of Previous Meeting</u></p> <p>Members RESOLVED:</p> <ul style="list-style-type: none"> - To accept the minutes of the Schools Forum, held on 25th May 2023, as a true record with the following amendment: <p>23/29 Feedback from Short Life Working Groups Paragraph 3 to read "...their members views on behalf of trade unions and communication processes with them."</p>	
23/47	<p><u>Matters Arising from the Meeting/Action Log</u></p> <p>MH noted that a copy of the Action Log had not been circulated with the documentation for the meeting. The Clerk extended her apologies and confirmed the action log would be updated and circulated for future meetings.</p> <p>Matters Arising from the Minutes</p> <p>23/28 Matters Arising from the Minutes</p> <ul style="list-style-type: none"> - 23/31 High Needs Block Additional Funding for 2023/2024. <p>MH noted that Mr Waller was not in attendance and queried if there was any feedback following the forum held on 30th June 2023. SM advised that the Forum had went well and provided an overview of the content. SM explained that the principle of the forum was to look at curriculums which would meet specific children's needs, rather than the child being forced down specific curriculum pathways. MH queried attendance at the forum and RC confirmed that it was well attended by professionals from a variety of settings. RC explained that one of the outcomes from the Forum was the potential implementation of a Pilot Scheme.</p> <p>SM explained that the forum focused on primary school aged pupils and he believed it would be beneficial to have a similar model within secondary schools.</p>	Clerk

<p>23/29 Feedback from Short Life Working Groups</p> <p>Schools Forum Membership</p> <p>MH noted a query had been put forward in relation to the Schools Forum membership only having one Teaching Association representation. AL explained that the query was in relation to school support staff representation opportunities. SM stated that the membership was in line with statutory requirements and queried whether it would be possible for the Teaching Association representative attending to put forward potential proposals to all trade union colleagues. AL stated that he believed the Education Joint Consultative Forum would be an appropriate forum to take this forward.</p> <p>Agreed Actions:</p> <p>23/28 Matters Arising from the Meeting</p> <ul style="list-style-type: none"> - Business Rates – Nursery Headteacher Query <p><i>MH queried if there had been any progress in relation to looking at potential options for rate funding rebates for nursery schools. LM advised that SGR was still investigating this and requested feedback be deferred until September 2023. Schools Forum members agreed the request.</i></p> <ul style="list-style-type: none"> - Birth Rates <p><i>MH advised members that AR had requested this item of business be deferred as up to date birth rate data was to be released in the near future.</i></p> <p>SM explained that a statutory requirement was to have this information presented to Cabinet.</p> <p>23/29 Feedback from Short Life Working Groups</p> <p>Schools Forum Membership:</p> <p>MH noted a query had been raised in relation to the different voting rights between Private Voluntary and Independent (PVI) Nurseries and Academy Primary, Infants and Junior. The Clerk confirmed that the response to this query had been recorded within the minutes and highlighted in italics.</p> <p>School Meal Provision:</p> <p>SM confirmed that the potential for schools to work collaboratively to reduce the overall costs for school provisions had been taken forward but this would require an optimum 20 to 30 schools to maximise viability. SM explained that he believed Headteacher's needed to consider whether they wanted to consider potential options available to reduce costs, explaining that Together for Children were unable to lead on this because of a potential conflict of interest.</p>	<p>SGR</p> <p>AR</p>
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	<p>23/30 Dedicated School Grant Outturn 2022/2023 and Budget 2023/2024</p> <p>MH noted PR was tasked to present case studies to assure the Schools Forum that placements were appropriate and proposed this was taken forward to September 2023. SM stated that he believed this could be taken forward within either the School Forum or a Drop In Forum and requested members to inform him of their views.</p> <p>LM proposed, in SGR's absence, the action to present comparative data about High Needs Block funding positions for LA's be deferred until September 2023 meeting. Members agreed the proposal.</p>	<p>Members</p> <p>SGR</p>
23/48	<p><u>Feedback from Short Life Working Groups</u></p> <p><u>Schools Forum Membership</u></p> <p>Members confirmed this item of business had been considered in detail within this meeting.</p> <p><u>School Meal Provision</u></p> <p>Members confirmed this item of business had been considered in detail within this meeting.</p> <p><u>School Transport</u></p> <p>MH invited an update in relation to the School Transport Working Party. KR advised that this project was progressing, reporting that some dedicated resources had been identified to increase resources within the School Transport Team: a new Team member had been appointed who would be taking the lead on the project.</p> <p>MH explained that School Transport was an area of interest for the Schools Forum due to the significant costs being encountered. MH advised that he was aware that a number of alternative transport options were being considered, exemplifying encouraging pupil independence in relation to transport options and implementing centralised pick up points. MH stated that going forward it was hoped any new options implemented would reduce carbon emissions.</p> <p>SM informed members that he was currently involved in a project with Academy 360 and provided an overview of his involvement. SM explained that he wanted to work with CAP as he was aware some pupils who were being transported by taxi to and from school had no issues using public transport for personal reasons and he believed this was a waste of resource. SM reported that the estimated cost for transport at the end of the year was £3m.</p> <p>KR shared that there were some exciting IT developments which could potentially be used with young pupils, which would ensure children were safeguarded and alleviate parental concerns.</p>	

	<p>Members were advised that the Working Party were looking at how some pupils could be supported with an individual package of resources.</p> <p>KR explained that one of the barriers which needed to be resolved was the statutory legal requirements to provide school transport and confirmed that updates from the working party would be provided.</p> <p><i>PS queried if it would be possible to have a timeline for potential draft proposals and KR confirmed it would, sharing that at the moment this detail was within the project documentation and a new lead had only recently been appointed. KR stated that she believed this additional resource would provide Paul Tomlin with capacity to provide feedback.</i></p>	KR
23/49	<p><u>Presentations</u></p> <p>There were no presentations within the meeting.</p>	
23/50	<p><u>Reports for Discussions and Decision</u></p> <p><u>Birth Rates – Impact on Early Years Schooling</u></p> <p>Members noted this item of business had been deferred to September 2023.</p>	AR
23/51	<p><u>Reports for Discussion and Decision</u></p> <p><u>Schools Forum Provision Future Dates and Work Plan</u></p> <p>Members confirmed they had received copies of the following documents prior to the meeting:</p> <ul style="list-style-type: none"> - Schools Forum Meeting Schedule and Work Plan (dated 6th July 2023) - Proposed Meeting Schedules 2023/2024 - <u>Schools Forum meeting Schedule and Work Plan</u> <p>SM presented the Schools Forum Meeting Schedule and Work Plan at the meeting and invited comments/suggestions on the content.</p> <p>Following a detailed review of the Schools Forum Meeting Schedule and Work Plan School Forum document members confirmed they were happy to accept the document, on the premise that agreed changes were implemented.</p> <ul style="list-style-type: none"> - <u>Proposed Meeting Schedule 2023/2024</u> <p>SM advised colleagues that work had been undertaken to draft a meeting schedule for Headteacher Representative Groups for 2023/2024: within Model A Headteacher forums were scheduled the week following the Schools Forum meetings and within Model B they were scheduled the day prior to the Schools</p>	

	<p>Forum meetings. Schools Forum members agreed to put forward the proposal for Model B as this would provide representatives with an opportunity to discuss any proposals being put forward with colleagues prior to attending the Schools Forum meeting. <i>The Clerk confirmed that she would circulate the draft schedule to Headteacher colleagues for consideration.</i></p> <p>Members RESOLVED:</p> <ul style="list-style-type: none"> - To accept the Schools Forum Meeting Schedule and Work Place, on the premise the documents reflected the changes agreed within the meeting. - To put forward a proposal to implement Model B of the Proposed Headteacher Representative Group Meeting Schedule for 2023/2024. 	<p>Clerk (completed)</p>
<p>23/52</p>	<p><u>Reports for Discussion and Decision</u></p> <p><u>Terms of Reference</u></p> <p><u>Sunderland Headteacher and School Leader Groups</u></p> <p>Copies of the following documents were presented at the meeting:</p> <ul style="list-style-type: none"> - Draft Correspondence detailing the review of the Headteacher and School Leader Groups - Sunderland Headteacher Representative Groups <p>SM explained that work had been undertaken with colleagues to consider how effective processes could be implemented.</p> <p><u>Draft Correspondence</u></p> <p>SM explained that the correspondence detailed the role undertaken by TfC on three distinct programmes:</p> <ul style="list-style-type: none"> - A review of current Headteacher and School Leader Representation - To design a shared Terms of Reference for Headteachers and Headteacher representatives - To build a digital platform to support effective communication. <p>SM advised colleagues that the TfC Leadership Website was now operational and this would be a “one stop shop” for information. SM explained that parts of the website would have restricted access but Headteacher colleagues would be receiving details of the password access.</p> <p>SM highlighted that the correspondence detailed the requirement for Headteachers to uphold and demonstrate the seven Nolan Principles of public life and the Headteacher Standards 2020 also detailed the following expectations.</p> <ul style="list-style-type: none"> - Take responsibility for their own continued professional development, engaging critically with educational research. 	

- Make a positive contribution to the wider education system.
- Forge constructive relationships beyond the school, working in partnership with parents, carers, and the local community.
- Commit their school to work successfully with other schools and organisations in a climate of mutual challenge and support.
- Establish and maintain working relationships with fellow professionals and colleagues across other public services to improve educational outcomes for all pupils.

Sunderland Headteacher and School Leader Groups – Terms of Reference

SM explained to colleagues that the Terms of Reference were drafted to cover a number of forums.

SM advised that he was aware some Headteacher colleagues did not attend or participate in any forums and he would like to discuss this issue with the individual chairs for each forum.

SM invited comments/suggestions on the content of the Terms of Reference from colleagues. Following a detailed review of the Terms of Reference Schools Forum members confirmed they were happy for the reviewed correspondence and Terms of Reference to be disseminated, on the premise the documents reflected the changes agreed within the meeting.

AB queried if the correspondence and Terms of Reference would also be circulated to Chief Executive Officers of multi academy trusts and SM confirmed they would.

Sunderland Schools Forum – Terms of Reference

Members confirmed they had received a copy of the following document prior to the meeting:

- Sunderland Schools Forum – Terms of Reference

KR provided an overview of the Terms of Reference content, explaining that this had been completed in line with sharing best practice.

SM confirmed that he and MH had discussed the potential difficulties which may be encountered in relation to appointing a Chair and Vice Chair for the Schools Forum.

MH stated that he believed the Terms of Reference was an interesting document in its entirety explaining that there were no standard roles and School Forums followed the guidance issued by the Education and Skills Funding Agency (ESFA). MH shared that he was concerned about the potential for School Forums to become tied up in rules and regulations. SM acknowledged the concern but stated that due to the challenges being encountered (examplng alternative placements and special educational needs/disabilities) he believed it was

	<p>important to have consistency in relation to strategy considerations to attain resolutions.</p> <p>KR proposed members consider the content of the Terms of Reference and provide feedback by 14th July 2023 and the acceptance of the Terms of Reference, by exception. Members agreed the proposal.</p> <p>MH clarified that the proposal was for the Terms of Reference to be operational from September 2023. KR confirmed this statement, highlighting that membership had already been discussed and the agreement was current membership would roll over into the 2023/2024 but re-appointed formally in 2023 for a 4 year term of office. MH requested, and received, verification that each representative would discuss nominations within their individual forums.</p> <p>Members RESOLVED:</p> <ul style="list-style-type: none"> - To accept the correspondence detailing the review of the Headteacher and School Leader Groups and the Sunderland Headteacher Representative Groups Terms of Reference, on the premise the documents reflected the changes agreed within the meeting. - To agree the correspondence and Sunderland Headteacher Representative Group Terms of Reference could be disseminated. - To accept the Schools Forum Terms of Reference on the premise any comments/proposals submitted by 14th July 2023 were taken forward as appropriate. 	
23/53	<p><u>Any Other Business</u></p> <p><u>Leadership Website</u></p> <p>SM presented the Leadership Website at the forum.</p> <p>RC highlighted that the website was separated into subject areas and some of these areas would have restricted access, for example the Headteacher Cluster Forums.</p> <p>RC explained that going forward the website would be extended to include webinars and good practice information.</p> <p>SM advised that all Headteachers would be issued with a password for the restricted areas and they would also be invited to put forward nominations for access within their organisations.</p> <p><u>Consilium Evolve</u></p> <p>KR reminded colleagues that invitations had been extended to visit the above establishment (on either the 10th or 17th July 2023) and invited members to contact her directly if they wished to take this opportunity forward.</p>	

	<u>Link School – Respite Charges</u> DW advised colleagues that respite charges would be increasing from September 2023 but stated that these were still cost effective in terms of the charges implemented by neighbouring local authorities.	
23/54	<u>Date and Time of Next Meeting</u> Thursday 14 th September 2023 at 8.30 am Venue: Conference Room, Link School, Pallion	

Subject To Approval

REPORT TO SUNDERLAND SCHOOLS FORUM

REPORT OF DIRECTOR OF FINANCE

20 October 2023

BUDGET PLANNING FRAMEWORK 2024/25

1. Purpose of the Report

To update Schools Forum on changes to the Schools Funding Formula for 2024/25.

2. Schools and High Need Funding Reform July/October 2023

In July 2023 the ESFA published the provisional National Funding Formula (NFF) allocations at Local Authority (LA) level for the Schools, High Needs and Central School Services funding blocks for 2024/25.

In October 2023, the ESFA discovered technical errors in the formula issued to LAs which occurred when processing pupil numbers incorrectly. This affected all LAs nationally and equated to approximately £2m of over-funding to Sunderland in the initial allocations published in July 2023 along with over-inflated factor values. The ESFA have since issued revised allocations along with corrected factor values.

The total amount of funding in the core schools' budget (which includes funding through the schools NFF, High Needs and CSSB) will remain at £59.6 billion in 2024/25.

The ESFA has confirmed that it will move forward with its plans to implement a direct NFF, whereby funding will be allocated directly to schools based on a single, national formula. A gradual approach is being taken to transition to the direct NFF. In 2024/25, each local authority will continue to set a local schools funding formula, in consultation with local schools through the Schools' Forum. To ensure a smooth transition, Local Authorities will be required to start bringing their own formulae even closer to the Schools' NFF from 2024/25.

It is expected that the direct NFF could be in operation by the 2027/28 funding year, however, this may happen sooner.

Overall funding, through the mainstream schools national funding formula (NFF), is increasing by 1.9% per pupil in 2024/25, compared to 2023/24 (originally stated as 2.7% in July 2023). This equates to the average per pupil increase across the NFF nationally.

High needs funding is increasing by a further £440m, or 4.3%, in 2024/25, following the £970 million increase in 2023/24.

Key changes to the Schools' NFF in 2024/25 are:

- Rolling the 2023/24 Mainstream Schools Additional Grant (MSAG¹) into the schools NFF ensuring that this additional funding forms an on-going part of schools' core budgets. Appropriate adjustments have been made to NFF factor values and baselines to reflect this. These are the Basic Entitlement, Minimum per Pupil, Free School Meals Ever 6 and Lump Sum factors.
- The government announced additional funding for teachers' pay in July 2023. This will be allocated to mainstream schools through the teachers' pay additional grant (TPAG) and will be allocated outside of the NFF in 2024/25.

Increasing factor values by (on top of the amounts that have been added for MSAG):

- 1.4% to the following factors: basic entitlement, low prior attainment (LPA), FSM6, income deprivation affecting children index (IDACI), English as an additional language (EAL), mobility and the lump sum.
- 1.6% to the free school meals (FSM) factor value with the gross domestic product (GDP) deflator forecast for 2024/25.
- 1.4% increase to minimum per pupil levels (MPPL) so that every Primary School will receive at least £4,610 per pupil and £5,995 for Secondary Schools.
- 0.5% to the funding floor (MFG) to ensure every school attracts at least 0.5% per pupil-led funding².

Key changes to the High Needs Block (HNB) NFF in 2024/25 are:

- Each local authority will see an increase of at least 3% per head of their 2 to 18 population (as estimated by the Office for National Statistics).
- The gains cap is set at 5%, allowing local authorities to see gains up to this percentage increase under the formula, again calculated on a per head basis of their 2 to 18 population.

Central Schools Services funding in 2024/25 will continue to be protected so that the maximum per-pupil year-on-year reduction in funding for ongoing responsibilities is at -2.5%. The year-on-year gains cap will be set at the highest affordable rate of 5.51%, for the ongoing responsibilities that local authorities continue to have for all schools. Funding for historic commitments within this block will decrease by a further 20% for those local authorities in receipt of this funding.

Early Years provisional allocations will be updated in December 2023.

Local Authorities will continue to be able to transfer up to 0.5% of their Schools Block to other blocks of the DSG, with Schools Forum approval. See Appendix A for details.

Final DSG allocations will be published in December 2023. These final allocations will use the October 2023 census data.

¹ Following the Autumn 2022 Statement, the ESFA announced an increase of £2bn to core budgets over and above the 2021 spending review. This grant (MSAG) was allocated separately to the NFF. Now rolled in to 2024/25 allocations.

² Minimum Funding Guarantee (MFG) can again be set between 0% and +0.5% per pupil.

The provisional allocations for Sunderland are shown in the tables below:

	Funding Baseline 2023/24	Provisional Allocation 2024/25	Increase 2024/25
	£m	£m	£m
Schools	*210.327	**214.762	4.435
Central Services	1.407	1.487	0.080
High Needs	42.983	44.899	1.916
Total	254.717	261.148	6.431
* Total comprised of £203.282m through formula plus £7.045m MSAG			
** MSAG rolled into formula			

Business Rates are included in the above allocations then removed from the funding formula.

Transition requirements:

Local authorities must move their local formula factor values at least 10% closer to the NFF compared with 2023/24, except where local formulae are already mirroring the NFF. The only factors that differed from the NFF at Sunderland were the Basic Entitlement (AWPU) factors³ but were within the allowable parameters therefore deemed to be full NFF.

³ Basic entitlement (AWPU) adjusted to allow transfer of 0.5% transfer to support the High Needs Block.

3. How the 2024/25 NFF Factor Values are calculated

		Sunderland 23-24 unit values (APT)	NFF 23-24 unit values	23-24 MSAG added	NFF 24-25 base unit values	% increase 24-25	NFF 24-25 unit values	% diff from 23-24 NFF	
		Sunderland AWPU adjusted in 23-24 to allow transfer of 0.5% to HNB							
Basic Entitlement (AWPU)	Primary	£3,335.78	£3,394	£119	£3,513	1.4%	£3,562	4.9%	
	KS3	£4,716.96	£4,785	£168	£4,953	1.4%	£5,022	5.0%	
	KS4	£5,320.67	£5,393	£190	£5,583	1.4%	£5,661	5.0%	
Minimum Funding per Pupil	Primary	£4,405	£4,405	£143	£4,548	1.4%	£4,610	4.7%	
	Secondary KS3	£5,503	£5,503	£186	£5,689	1.4%	£5,771	4.9%	
	Secondary KS4	£6,033	£6,033	£208	£6,241	1.4%	£6,331	4.9%	
Deprivation	Primary FSM	£480	£480		£480	1.6%	£490	2.1%	
	Secondary FSM	£480	£480		£480	1.6%	£490	2.1%	
	Primary FSM6	£705	£705	£104	£809	1.4%	£820	16.3%	
	Secondary FSM6	£1,030	£1,030	£152	£1,182	1.4%	£1,200	16.5%	
	Primary IDACI F	£230	£230		£230	1.4%	£235	2.2%	
	Primary IDACI E	£280	£280		£280	1.4%	£285	1.8%	
	Primary IDACI D	£440	£440		£440	1.4%	£445	1.1%	
	Primary IDACI C	£480	£480		£480	1.4%	£485	1.0%	
	Primary IDACI B	£510	£510		£510	1.4%	£515	1.0%	
	Primary IDACI A	£670	£670		£670	1.4%	£680	1.5%	
	Secondary IDACI F	£335	£335		£335	1.4%	£340	1.5%	
	Secondary IDACI E	£445	£445		£445	1.4%	£450	1.1%	
	Secondary IDACI D	£620	£620		£620	1.4%	£630	1.6%	
	Secondary IDACI C	£680	£680		£680	1.4%	£690	1.5%	
	Secondary IDACI B	£730	£730		£730	1.4%	£740	1.4%	
	Secondary IDACI A	£930	£930		£930	1.4%	£945	1.6%	
	Low Prior Attainment	Primary	£1,155	£1,155		£1,155	1.4%	£1,170	1.3%
		Secondary	£1,750	£1,750		£1,750	1.4%	£1,775	1.4%
English as Additional Language	Primary	£580	£580		£580	1.4%	£590	1.7%	
	Secondary	£1,565	£1,565		£1,565	1.4%	£1,585	1.3%	
Mobility	Primary	£945	£945		£945	1.4%	£960	1.6%	
	Secondary	£1,360	£1,360		£1,360	1.4%	£1,380	1.5%	
Lump Sum	Primary & Secondary	£128,000	£128,000	£4,510	£132,510	1.4%	£134,400	5.0%	

Lump sum rounded to the nearest £100

Secondary Minimum per Pupil Funding = (KS3 value x 3 (year groups) + KS4 value x 2 (year groups)) ÷ 5 (total year groups) = £6,050

4 Transfer of 0.5% to the HNB

Appendix A provides further detail on the potential transfer of 0.5% of funding from the Schools Block and Appendix B demonstrates the potential impact per School of the transfer.

5 Recommendation

Schools Forum is asked to approve or otherwise the transfer of 0.5% from the Schools Block to the HNB for 2024/25 in order that further NFF modelling can be undertaken and presented to the November Forum for further consultation and agreement.

Transfer of up to 0.5% to the High Needs Block

Local authorities will continue to be able to transfer up to 0.5% of their Schools Block to other blocks of the DSG, with Schools Forum approval.

The potential impact per school is shown below (Appendix B) and shows full NFF with no transfer alongside a model showing transfer of 0.5% which equates to an estimated £1.06m.

Explanatory Notes

1. The figures below are for illustrative purposes only and do not represent, at this stage, what schools will receive in 2024/25 as the model is based on initial allocations and uses October 2022 data, updated with new factor values.
2. This model uses the same Basic Entitlement factor as 2023/24 for the transfer for comparison purposes.
3. If the transfer is to go ahead other models will be analysed to find the most equitable formula, however due to the transition requirements, the options are now limited.
4. Some schools have a zero contribution to the transfer, which is due to those schools being funded at the Minimum per Pupil level of funding (MPP). Any deduction would make those schools fall below the minimum levels; therefore, the formula will not allow any deduction to be made. This relates to schools who attract lower levels of additional needs funding (IDAC/FSM etc.). Those schools are protected by the Minimum per Pupil Funding factor to ensure they receive at least £4,610 per pupil for Primaries and £5,995 per pupil for Secondaries.
5. For the yearly funding comparison calculations, de-delegation of Trade Union Facility Time has been excluded.
6. The higher cash/increases compared with 2023/24 are due to the MSAG being rolled into the 2024/25 formula. This was paid as a separate grant in 2023/24.

Sunderland Schools 2024/25 Provisional Funding Allocations		2023/24		No Transfer to HNB		0.5% Transfer to HNB (£1.065m)							The formula does not allow deductions to be made from Schools who are being funded at the minimum funding level protection per pupil.
		£203,281,905 £1,754,563 £1,012,590 £200,514,752		£214,762,275 Total Allocation £1,821,204 Less Rates 0 Less HNB Trans £212,941,071		Using the <u>Basic Entitlement Factor</u> Deemed full NFF Primary Basic reduced to 3,540.67 KS3 Basic reduced to 5,000.67 KS4 Basic reduced to 5,639.67 Primary median -£34.04 min £0.00 max -£34.04 Secondary -£34.04 -£34.04 -£34.04 £211,876,366 £11,361,614 For info Avg deduction per pupil -£33.14 -£34.04 -£1,064,705							
School Name	36101 Oct 22 Pupils	Budget 2023/24 Exc de-del	Budget 2024/25	Cash change from 23/24	% cash increas	Budget 2024/25 Exc De Del	Cash change from 23/24	% cash incre	MPP	MFG value	Cost of transfer to HNB	HN Transfer cost per pup	Commentary
Albany Village Primary	190	£1,003,658	£1,068,662	£65,004	6.5%	£1,062,195	£58,536	5.8%	£0	£0	£-6,467	£-34.04	
Barmston Village Primary	201	£1,137,888	£1,209,666	£71,777	6.3%	£1,202,824	£64,935	5.7%	£0	£0	£-6,842	£-34.04	
Barnes Infant Academy	252	£1,219,292	£1,294,222	£74,930	6.1%	£1,285,644	£66,352	5.4%	£0	£0	£-8,578	£-34.04	
Barnes Junior	337	£1,541,735	£1,641,913	£100,178	6.5%	£1,630,442	£88,707	5.8%	£0	£0	£-11,471	£-34.04	
Barnwell Academy	206	£981,851	£1,045,268	£63,417	6.5%	£1,038,256	£56,405	5.7%	£0	£0	£-7,012	£-34.04	
Benedict Biscop	245	£1,079,225	£1,129,450	£50,225	4.7%	£1,129,450	£50,225	4.7%	£47,626	£0	£0	£0.00	at min funding level
Bernard Gilpin Primary	417	£1,838,210	£1,943,337	£105,127	5.7%	£1,929,143	£90,932	4.9%	£0	£0	£-14,194	£-34.04	
Bexhill Academy	302	£1,542,921	£1,641,172	£98,251	6.4%	£1,630,892	£87,971	5.7%	£0	£0	£-10,280	£-34.04	
Biddick Primary	272	£1,206,161	£1,253,920	£47,759	4.0%	£1,253,920	£47,759	4.0%	£21,658	£0	£0	£0.00	at min funding level
Blackfell Primary	163	£804,885	£856,784	£51,899	6.4%	£851,235	£46,351	5.8%	£0	£0	£-5,548	£-34.04	
Broadway Junior	229	£1,177,927	£1,255,198	£77,271	6.6%	£1,247,403	£69,476	5.9%	£0	£0	£-7,795	£-34.04	
Burnside Academy	124	£681,279	£725,122	£43,843	6.4%	£720,901	£39,623	5.8%	£0	£0	£-4,221	£-34.04	
Castletown Primary	330	£1,591,394	£1,691,382	£99,988	6.3%	£1,680,150	£88,755	5.6%	£0	£0	£-11,233	£-34.04	
Dame Dorothy Primary	197	£986,197	£1,049,057	£62,861	6.4%	£1,042,352	£56,155	5.7%	£0	£0	£-6,706	£-34.04	
Diamond Hall Infant Academy	267	£1,406,780	£1,492,901	£86,122	6.1%	£1,483,813	£77,033	5.5%	£0	£0	£-9,088	£-34.04	
Diamond Hall Junior Academy	330	£1,689,113	£1,797,335	£108,221	6.4%	£1,786,102	£96,988	5.7%	£0	£0	£-11,233	£-34.04	
Dubmire Primary	347	£1,596,960	£1,702,867	£105,908	6.6%	£1,691,056	£94,096	5.9%	£0	£0	£-11,812	£-34.04	
Easington Lane Primary	260	£1,347,480	£1,435,483	£88,003	6.5%	£1,426,633	£79,153	5.9%	£0	£0	£-8,850	£-34.04	
East Herrington Primary Academy	410	£1,807,712	£1,890,323	£82,610	4.6%	£1,890,100	£82,388	4.6%	£13,733	£0	£-223	£-0.54	at min funding level
East Rainton Primary	109	£600,343	£630,835	£30,492	5.1%	£627,125	£26,782	4.5%	£0	£0	£-3,710	£-34.04	
English Martyrs'	173	£956,086	£1,015,477	£59,391	6.2%	£1,009,588	£53,502	5.6%	£0	£0	£-5,889	£-34.04	
Eppleton Academy Primary	188	£949,209	£1,009,860	£60,652	6.4%	£1,003,461	£54,252	5.7%	£0	£0	£-6,399	£-34.04	
Farrington Academy	347	£1,736,878	£1,849,715	£112,838	6.5%	£1,837,904	£101,026	5.8%	£0	£0	£-11,812	£-34.04	
Fatfield Academy	191	£890,766	£944,582	£53,816	6.0%	£938,080	£47,314	5.3%	£0	£0	£-6,502	£-34.04	
Fulwell Infant Academy	282	£1,242,210	£1,300,020	£57,810	4.7%	£1,300,020	£57,810	4.7%	£28,013	£0	£0	£0.00	at min funding level
Fulwell Junior	344	£1,517,444	£1,585,840	£68,396	4.5%	£1,585,840	£68,396	4.5%	£97,146	£0	£0	£0.00	at min funding level
George Washington Primary	401	£1,919,709	£2,046,692	£126,983	6.6%	£2,033,042	£113,333	5.9%	£0	£0	£-13,650	£-34.04	
Gillas Lane Primary Academy	126	£762,378	£811,297	£48,919	6.4%	£807,008	£44,630	5.9%	£0	£0	£-4,289	£-34.04	
Grange Park Primary	202	£1,098,633	£1,168,513	£69,880	6.4%	£1,161,637	£63,004	5.7%	£0	£0	£-6,876	£-34.04	
Grangetown Primary	234	£1,215,451	£1,286,508	£71,057	5.8%	£1,278,542	£63,092	5.2%	£0	£0	£-7,965	£-34.04	
Grindon Infant	139	£750,386	£797,366	£46,981	6.3%	£792,635	£42,249	5.6%	£0	£0	£-4,731	£-34.04	
Hasting Hill Academy	185	£1,019,884	£1,084,668	£64,783	6.4%	£1,078,370	£58,486	5.7%	£0	£0	£-6,297	£-34.04	
Hetton Lyons Primary	435	£2,002,172	£2,130,717	£128,545	6.4%	£2,115,910	£113,737	5.7%	£0	£0	£-14,807	£-34.04	
Hetton Primary	167	£923,809	£982,706	£58,897	6.4%	£977,022	£53,212	5.8%	£0	£0	£-5,685	£-34.04	

School Name	Oct 22 Pupils	2023/24	No Transfer to HNB			0.5% Transfer to HNB (£1.065m)							HN Transfer cost per pupil	Commentary
		Budget 2023/24 Exc de-del	Budget 2024/25	Cash change from 23/24	% cash increase	Budget 2024/25 Exc De Del	Cash change from 23/24	% cash increase	MPP	MFG value	Cost of transfer to HNB			
Highfield Academy	362	£1,887,419	£2,008,358	£120,939	6.4%	£1,996,036	£108,617	5.8%	£0	£0	-£12,322	-£34.04		
Hill View Infant Academy	345	£1,519,725	£1,590,450	£70,725	4.7%	£1,590,450	£70,725	4.7%	£23,287	£0	£0	£0.00	at min funding level	
Hill View Junior Academy	447	£1,971,288	£2,060,670	£89,382	4.5%	£2,060,670	£89,382	4.5%	£75,465	£0	£0	£0.00	at min funding level	
Holley Park Academy	237	£1,051,788	£1,106,388	£54,600	5.2%	£1,098,321	£46,532	4.4%	£0	£0	-£8,067	-£34.04		
Hudson Road Primary	280	£1,468,787	£1,524,564	£55,777	3.8%	£1,523,094	£54,307	3.7%	£0	£8,061	-£1,470	-£5.25		
Hylton Castle Primary	200	£1,055,368	£1,123,150	£67,782	6.4%	£1,116,342	£60,974	5.8%	£0	£0	-£6,808	-£34.04		
John F Kennedy Primary	391	£1,817,336	£1,933,023	£115,686	6.4%	£1,919,713	£102,377	5.6%	£0	£0	-£13,309	-£34.04		
Lambton Primary	185	£910,001	£968,284	£58,283	6.4%	£961,986	£51,986	5.7%	£0	£0	-£6,297	-£34.04		
Marlborough Primary	139	£847,072	£900,458	£53,386	6.3%	£895,726	£48,654	5.7%	£0	£0	-£4,731	-£34.04		
Mill Hill Primary	415	£1,828,075	£1,913,150	£85,075	4.7%	£1,913,150	£85,075	4.7%	£42,650	£0	£0	£0.00	at min funding level	
New Penshaw Academy	135	£768,693	£816,622	£47,929	6.2%	£812,027	£43,334	5.6%	£0	£0	-£4,595	-£34.04		
New Silksworth Academy Infant	145	£739,571	£786,516	£46,946	6.3%	£781,581	£42,010	5.7%	£0	£0	-£4,936	-£34.04		
New Silksworth Academy Junior	195	£1,016,875	£1,084,014	£67,139	6.6%	£1,077,377	£60,502	5.9%	£0	£0	-£6,638	-£34.04		
Newbottle Primary Academy	411	£1,812,860	£1,894,710	£81,850	4.5%	£1,894,710	£81,850	4.5%	£30,823	£0	£0	£0.00	at min funding level	
Northern Saints	513	£2,581,179	£2,747,365	£166,186	6.4%	£2,729,903	£148,724	5.8%	£0	£0	-£17,462	-£34.04		
Our Lady Queen of Peace	313	£1,380,014	£1,442,930	£62,916	4.6%	£1,442,930	£62,916	4.6%	£14,442	£0	£0	£0.00	at min funding level	
Oxclose Primary Academy	196	£1,033,688	£1,100,710	£67,023	6.5%	£1,094,039	£60,351	5.8%	£0	£0	-£6,672	-£34.04		
Plains Farm Academy	163	£896,776	£953,867	£57,091	6.4%	£948,318	£51,543	5.7%	£0	£0	-£5,548	-£34.04		
Redby Academy	278	£1,229,409	£1,295,353	£65,944	5.4%	£1,285,890	£56,481	4.6%	£0	£0	-£9,463	-£34.04		
Richard Avenue Primary	377	£1,868,183	£1,983,042	£114,860	6.1%	£1,970,210	£102,027	5.5%	£0	£0	-£12,833	-£34.04		
Rickleton Primary	383	£1,690,172	£1,765,630	£75,458	4.5%	£1,765,630	£75,458	4.5%	£97,906	£0	£0	£0.00	at min funding level	
Ryhope Infant Academy	107	£600,237	£629,272	£29,035	4.8%	£625,630	£25,393	4.2%	£0	£0	-£3,642	-£34.04		
Ryhope Junior	209	£1,057,732	£1,127,349	£69,617	6.6%	£1,120,234	£62,502	5.9%	£0	£0	-£7,114	-£34.04		
Seaburn Dene Primary	180	£823,134	£875,610	£52,476	6.4%	£869,483	£46,349	5.6%	£0	£0	-£6,127	-£34.04		
Shiney Row Primary	203	£1,072,197	£1,142,376	£70,180	6.5%	£1,135,466	£63,270	5.9%	£0	£0	-£6,910	-£34.04		
South Hylton Primary Academy	234	£1,146,029	£1,219,590	£73,561	6.4%	£1,211,625	£65,596	5.7%	£0	£0	-£7,965	-£34.04		
Southwick Community Primary	293	£1,684,745	£1,790,123	£105,378	6.3%	£1,780,150	£95,404	5.7%	£0	£0	-£9,974	-£34.04		
Springwell Village Primary	185	£818,571	£872,015	£53,444	6.5%	£865,718	£47,147	5.8%	£0	£0	-£6,297	-£34.04		
St Anne's RC Primary	206	£1,028,010	£1,092,252	£64,242	6.2%	£1,085,240	£57,230	5.6%	£0	£0	-£7,012	-£34.04		
St Bede's Catholic Primary	191	£888,317	£944,700	£56,383	6.3%	£938,199	£49,882	5.6%	£0	£0	-£6,502	-£34.04		
St Benet's RC Primary	308	£1,357,404	£1,419,880	£62,476	4.6%	£1,419,880	£62,476	4.6%	£44,373	£0	£0	£0.00	at min funding level	
St Cuthbert's RC Primary	208	£985,890	£1,047,968	£62,078	6.3%	£1,040,888	£54,998	5.6%	£0	£0	-£7,080	-£34.04		
St John Bosco RC Primary	196	£984,105	£1,045,525	£61,420	6.2%	£1,038,854	£54,748	5.6%	£0	£0	-£6,672	-£34.04		
St John Boste Catholic Primary	170	£803,566	£854,854	£51,287	6.4%	£849,067	£45,500	5.7%	£0	£0	-£5,787	-£34.04		
St Joseph's Catholic Primary	199	£912,224	£970,401	£58,177	6.4%	£963,627	£51,403	5.6%	£0	£0	-£6,774	-£34.04		
St Joseph's RC Primary	211	£1,046,328	£1,105,440	£59,112	5.6%	£1,098,258	£51,930	5.0%	£0	£0	-£7,182	-£34.04		
St Leonard's Catholic Primary	118	£590,240	£621,662	£31,422	5.3%	£617,645	£27,405	4.6%	£0	£0	-£4,017	-£34.04		
St Mary's RC Primary	417	£1,836,885	£1,922,370	£85,485	4.7%	£1,922,370	£85,485	4.7%	£101,843	£0	£0	£0.00	at min funding level	
St Michael's Catholic Primary	208	£954,685	£1,014,665	£59,979	6.3%	£1,007,584	£52,899	5.5%	£0	£0	-£7,080	-£34.04		
St Patrick's Catholic Primary	138	£710,241	£754,823	£44,582	6.3%	£750,126	£39,884	5.6%	£0	£0	-£4,697	-£34.04		
St Paul's CoF Primary	243	£1,071,698	£1,141,137	£69,439	6.5%	£1,132,866	£61,168	5.7%	£0	£0	-£8,272	-£34.04		

School Name	Oct 22 Pupils	2023/24	No Transfer to HNB			0.5% Transfer to HNB (£1.065m)						HN Transfer cost per pupil	Commentary
		Budget 2023/24 Exc de-del	Budget 2024/25	Cash change from 23/24	% cash increase	Budget 2024/25 Exc De Del	Cash change from 23/24	% cash increase	MPP	MFG value	Cost of transfer to HNB		
Thorney Close Primary	232	£1,224,387	£1,302,409	£78,022	6.4%	£1,294,512	£70,125	5.7%	£0	£0	-£7,897	-£34.04	
Town End Academy	195	£1,018,879	£1,082,758	£63,879	6.3%	£1,076,120	£57,242	5.6%	£0	£0	-£6,638	-£34.04	
Usworth Colliery Primary	345	£1,745,660	£1,856,926	£111,266	6.4%	£1,845,182	£99,522	5.7%	£0	£0	-£11,744	-£34.04	
Valley Road Academy	313	£1,677,874	£1,782,575	£104,701	6.2%	£1,771,921	£94,047	5.6%	£0	£0	-£10,654	-£34.04	
Wessington Primary	198	£1,050,557	£1,117,797	£67,240	6.4%	£1,111,057	£60,500	5.8%	£0	£0	-£6,740	-£34.04	
Willow Wood Community Primary	179	£1,050,370	£1,117,140	£66,770	6.4%	£1,111,047	£60,677	5.8%	£0	£0	-£6,093	-£34.04	
Academy 360	883	£5,802,521	£6,180,061	£377,540	6.5%	£6,150,004	£347,483	6.0%	£0	£0	-£30,057	-£34.04	
Biddick Academy	1133	£6,984,679	£7,438,045	£453,365	6.5%	£7,399,478	£414,799	5.9%	£0	£0	-£38,567	-£34.04	
Castle View Enterprise Academy	1024	£6,876,014	£7,318,009	£441,995	6.4%	£7,283,153	£407,139	5.9%	£0	£0	-£34,856	-£34.04	
Christ's College	678	£3,829,174	£4,069,677	£240,504	6.3%	£4,046,599	£217,425	5.7%	£0	£0	-£23,079	-£34.04	
Farrington Community Academy	676	£4,464,407	£4,755,979	£291,573	6.5%	£4,732,969	£268,562	6.0%	£0	£0	-£23,011	-£34.04	
Hetton	640	£4,274,009	£4,555,531	£281,522	6.6%	£4,533,745	£259,737	6.1%	£0	£0	-£21,785	-£34.04	
Kepier	1128	£7,032,237	£7,492,301	£460,065	6.5%	£7,453,905	£421,669	6.0%	£0	£0	-£38,396	-£34.04	
Monkwearmouth Academy	879	£5,421,866	£5,775,345	£353,480	6.5%	£5,745,425	£323,559	6.0%	£0	£0	-£29,921	-£34.04	
Oxclose Community Academy	1132	£7,138,157	£7,600,905	£462,749	6.5%	£7,562,373	£424,216	5.9%	£0	£0	-£38,532	-£34.04	
Red House Academy	410	£3,052,440	£3,246,611	£194,171	6.4%	£3,232,655	£180,215	5.9%	£0	£0	-£13,956	-£34.04	
Sandhill View Academy	736	£6,111,929	£6,543,945	£432,016	7.1%	£6,518,893	£406,963	6.7%	£0	£0	-£25,053	-£34.04	
Southmoor Academy	1244	£7,802,727	£8,309,140	£506,413	6.5%	£8,266,795	£464,068	5.9%	£0	£0	-£42,345	-£34.04	
St Aidan's Catholic Academy	717	£4,428,466	£4,707,210	£278,744	6.3%	£4,682,804	£254,338	5.7%	£0	£0	-£24,406	-£34.04	
St Anthony's Catholic Academy	1089	£6,421,662	£6,837,735	£416,073	6.5%	£6,800,666	£379,004	5.9%	£0	£0	-£37,069	-£34.04	
St Robert of Newminster	1217	£7,032,819	£7,482,956	£450,137	6.4%	£7,441,530	£408,711	5.8%	£0	£0	-£41,426	-£34.04	
Thornhill Academy	552	£3,904,337	£4,147,321	£242,983	6.2%	£4,128,531	£224,193	5.7%	£0	£0	-£18,790	-£34.04	
Venerable Bede	895	£5,453,336	£5,811,476	£358,140	6.6%	£5,781,010	£327,675	6.0%	£0	£0	-£30,465	-£34.04	
Washington Academy	670	£4,743,704	£5,049,091	£305,387	6.4%	£5,026,285	£282,581	6.0%	£0	£0	-£22,806	-£34.04	

REPORT TO SUNDERLAND SCHOOLS FORUM

REPORT OF DIRECTOR OF FINANCE

20 October 2023

De-delegation of Trade Union Facility Time

1. Purpose of the Report

- 1.1 The purpose of this report is to provide Schools Forum with an updated briefing in relation to implementing the decision taken at the 8 July 2021 Schools Forum to de-delegate Trade Union Facility Time.

2. Background

- 2.1 The Local Authority is required to consult the primary and secondary maintained school representatives on the Schools Forum every year regarding the de-delegation of centrally held budgets. De-delegated funds are a deduction from maintained schools' budget shares, after the calculation of Schools Block allocations. De-delegation can only apply to maintained primary and secondary school budgets. Academies, free schools, special schools, PRUs and nurseries cannot de-delegate. However, they can choose to buy into the same de-delegated services on a traded arrangement, at an agreed rate per-pupil.
- 2.2 Decisions on de-delegation must be taken at the Schools Forum by primary and secondary sector representatives separately, every financial year. It requires the agreement of a simple majority of the maintained representatives for the relevant phase on the Schools Forum on a recommended per-pupil basis. For 2024/25 there are no secondary maintained schools, therefore this only applies to primary schools.

3. De-delegation Issues

- 3.1 Forum members are invited to note the following data:
- Currently, there are 34 primary schools in the maintained sector.
 - The anticipated income from maintained primary schools is £26,841.
 - The per pupil rate for 2024/25 is £3.21 (£2.80 per pupil for the period April to August rising to £3.50 for the period September to March). This is due to the per pupil rate originally being agreed at £3.50 per academic year, which was subsidised for the first two years, ending in August 2024.

3.2 Schools Forum members are also invited to note that decisions regarding rates per pupil are not wholly in the remit of the Forum. The rate needs to be agreed in advance by the unions and then submitted to Forum for approval as part of a continued de-delegation request. If it's more than an inflationary increase, then the request needs to be submitted with a working paper explaining the increase.

4. Recommendation

4.1 The Schools Forum is recommended to:

- (i) Note the contents of the report.
- (ii) Approve, or otherwise, the continuation of the de-delegation of Trade Union Facility Time.
- (iii) If de-delegation is to continue, approve the rates for the 2024/25 financial year.

If you have any queries in relation to the above report, please contact steve.renwick@togetherforchildren.org.uk

REPORT TO SUNDERLAND SCHOOLS FORUM

REPORT OF DIRECTORS OF FINANCE AND EDUCATION

20 October 2023

Dedicated Schools Grant Update and Projected Outturn 2023/24

1. Purpose of the Report

- 1.1 The purpose of this report is to provide the Schools' Forum with a projected outturn position for the Dedicated Schools Grant (DSG) in 2023/24 based on extant activity and funding information.
- 1.2 Section 2 of the report sets out the quantitative issues affecting the DSG and Section 3 covers some of the qualitative aspects.

2. Dedicated Schools Grant Projected Outturn 2023/24

- 2.1 The 2023/24 DSG in year forecast outturn position for is a projected deficit of £2,312,236. The DSG deficit balance carried forward from 2022/23 reported to Schools Forum in May 2023 was £4,427,335, which has now increased by £98,887 for the 2022/23 financial year following the Early Years Pupil number adjustment to funding for (updated by the ESFA in July 2023). Therefore, the amended DSG reserve balance as at 31 March 2023 is £4,526,222. The overall DSG deficit as at 31 March 2024 is projected to increase to £6,838,458. Details of the 2023/24 in-year projected overspend are provided in the table and paragraphs below:

2023/24 DSG Budget (After Recoupment)	Revised DSG Budget as at October 2023 £	Projected Outturn £	Total (Over) / Underspend £
Schools Block	42,684,426	42,366,372	318,054
Central School Services Block	1,407,262	1,306,910	100,352
Early Years Block	19,917,452	19,886,612	30,840
High Needs Block	33,774,422	36,535,904	(2,761,482)
TOTAL DSG	97,783,562	100,095,798	(2,312,236)

Schools Block and Central School Services Block (CSSB)

- 2.2 The Schools' Block is currently projected to be £318,054 underspent at the end of the current financial year due to projected underspends in Growth funding of £200,000 and Academy Rates savings following conversion of £118,054.

- 2.3 The Central School Services Block (CSSB) is projecting an overall underspend of £100,352 in the Historic School Redundancy budget. It is currently anticipated this budget will not be spent in 2023/24 as any School/DSG Redundancies will be funded from the Schools Redundancy Reserve.

Early Years Block

- 2.4 At this stage the Early Years Block projection is based on the 2023/24 budget position, with the exception of a small staffing underspend in the Early Years team of £30,840. Early Years funding for 2, 3 and 4 year old's is currently projected to break-even subject to updating of the census data for October 2023 pupil numbers. It is anticipated a more accurate projected outturn for Early Years funding will be provided at the January 2024 Schools Forum meeting.

High Needs Block

- 2.5 The volatility, uncertainty, and unknown variables in the High Needs Block (HNB) continue to make budget monitoring and forecasting the outturn position extremely challenging.
- 2.6 As at 20 October 2023, the projected HNB in-year outturn position for 2023/24 is an overspend of £2,761,482. The anticipated overspend is based on known commitments at this stage and is a result of a continued requirement for the increased number of commissioned places needed, EHCP top-up payments made during the year and additional Non-Maintained Independent Schools (NMIS) places.
- 2.7 The HNB forecast overspend is analysed in the table below:

High Needs Block	2023/24 Budget	2023/24 Projected Outturn	Variance
	£	£	£
Commissioned Places - Special	3,955,196	3,986,212	(31,016)
Commissioned Places - AP/Returners/Young Mums	2,540,476	2,535,944	4,532
Commissioned Places - Resource Provisions	230,166	210,166	20,000
Pay & Pensions Grant NEW in 21/22	806,124	821,854	(15,730)
Top Ups	15,256,614	16,158,486	(901,872)
Top Ups - Post 16	1,600,000	1,600,000	0
Virtual School	355,163	344,504	10,659
Residential – Non-Maintained Independent	5,974,459	7,824,202	(1,849,743)
Retained HNB	3,056,224	3,054,536	1,688
Total HNB - Together for Children	33,774,422	36,535,904	(2,761,482)

DSG Reserves

- 2.8 The previously reported DSG deficit reserve balance brought forward as at 31 March 2023 was £4,427,335 which, as detailed in point 2.1 above, has been adjusted by £98,887, therefore increased to £4,526,222. The projected in-year

outturn position for 2023/24 is £2,312,236 overspend, therefore the overall projected deficit on the DSG Reserve as at 31 March 2024 is £6,838,458.

2.9 Appendix A provides a summary position of the 2023/24 budget and projected outturn.

3. High Needs Block Pressures

3.1 High Needs Block pressures 2023/24:

- Increase in number of successful EHCP applications.
- Total number of EHCP as at September 2021 was 2,067 increasing by 326 to a total of 2,393 as at September 2022. This has further increased by 320 to a total of 2,713 EHCP's as at October 2023.
- Commissioned places: there is an overall increase of 144 places from 1,740 in September 2022 to 1,884 in September 2023 required in special schools and Resource Provisions. A detailed report on Commissioned place numbers for 2024/25 academic year will also be shared with Schools Forum in October meeting.
- NMIS: increased charges for inflation plus increase in pupil numbers placed.
- Current projections for 2023/24 for top-up fees are based on the current EHCP numbers as at October 2023.
- Uncertainty of future Health funding for EHCPs.
- Retained staff proposed pay awards.

4. Recommendations

4.1 The Schools Forum is invited to:

- i. Note the contents of the report;
- ii. Seek updates on the 2023/24 projected outturn position at the January 2024 and March 2024 School Forum meetings.

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REPORT TO SUNDERLAND SCHOOLS FORUM

REPORT OF DIRECTOR OF EDUCATION

14 September 2023

Foundation of Light Primary Intervention Programme

1. Purpose of the Report

To outline a new alternative provision primary intervention offer to be delivered by the Foundation of Light and to seek approval for TfC to commission 5 places at the provision.

2. Background

The Foundation of Light has grown to become one of the most pioneering sports charities in the country, winning multiple awards for ground-breaking programmes. The Foundation works with a large cross section of people from a number of communities, with ages ranging from 18 months to 80 years plus. Foundation programmes are designed to address local challenges in education, health and wellbeing, sport and play and world of work (employability) as well as specific programmes aimed to support veterans, young people, mental health, healthy eating, drug and alcohol misuse, bullying, racism, and anti-social behaviour.

Programmes are delivered by passionate, dedicated and highly skilled teams including teachers, health workers, coaches, family learning officers, youth workers and support staff based at offices and classrooms within the Beacon of Light and outreach centres throughout the region.

3. Primary Intervention Programme

Historically the Foundation offered an intervention programme for Key Stage 3 students which was superseded by the introduction of the Beacon of Light alternative provision. The purpose-built facilities remain available at the Stadium of Light and discussions were held as to the viability of an early intervention offer for Key Stage 2 students. There is demand across the city for a programme of this type to intervene at an early stage and deploy a preventive model / approach. The provision will be aimed at children who present with range 2 behaviours on the SEND SEMH range and would typically benefit from some form of intervention to prevent progression and escalation of behaviour which may lead to the need to a higher level of intervention such as the Link school or an assessment Hub for example. It would also be an expected outcome that instances of suspension and permanent exclusion be reduced.

The programme will be offered exclusively to Sunderland schools on a 3 to 6 week basis with the student attending Monday to Thursday, returning to their home school on a Friday of each week to ensure continuity of support. The curriculum offer will be delivered by qualified teachers on a 2:5 ratio in a classroom setting; core subjects will be delivered alongside a robust PSHE / RSE offer to meet the specific outcomes required in supporting the reduction of SEMH needs.

It is proposed that in the first academic year, commencing in October 2023, the programme will run on a rolling basis up to a maximum of 10 students. TfC are proposing to commission 5 of those places with the other 5 being commissioned directly by schools. The 5 places commissioned by TfC will be allocated via the Vulnerable Pupils Panel process.

4. Proposed Costs

A reduced rate has been negotiated in respect of TfC commissioned places. Each commissioned place per annum will cost £8,360 to TfC reduced from the higher rate of £12,160, totalling £41,800 for the 5 places. However, £80 per day will be recovered from schools in line with other alternative provision charging frameworks which will, at full capacity, bring £60,800 back into the HNB per annum.

5. Recommendations

The Schools Forum is recommended to:

- i. To agree to the commissioning of 5 places at the Foundation of Light from October 2023.