

To all members of the Sunderland Schools Forum

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

Date: 14th May 2025
Our TFC-SF/ZW

Dear Colleague

SUNDERLAND SCHOOLS FORUM

You are invited to attend a meeting of the Schools Forum, scheduled for Thursday 22nd May 2025 at 8.30 am. The meeting will be held virtually, and a Teams appointment has been circulated.

AGENDA

25/20	Welcome, Introductions and Apologies Apologies submitted by DO and Jho.	
25/21	Declarations of Interest	
25/22	Minutes of Previous Meeting School Forum meeting, held on 6 th March 2025 (attached)	
25/23	Matters Arising from the Minutes/Agreed Actions (Action Log attached)	
25/24	Feedback from Short Life Working Groups	
	<ul style="list-style-type: none"> Inclusion Quality Assurance Processes for Service Providers DBV Funding: Probity (update on working group arrangements) 	KR PR PR
25/25	Presentations:	
25/26	Reports for Discussion and Decision <ul style="list-style-type: none"> Dedicated Schools Grant 2024/25 Final Outturn and 2025/26 Budget Voting: All SF Members Non-statutory High Needs Funding for Reception Aged Children (STEP funding) and High Needs Exceptional Funding Requests (report attached) Voting: All SF Members DBV Update 	DO PR PR

25/27	Any Other Business	
25/28	Date and Time of Next Meeting 3 rd July 2025	

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

Yours faithfully



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SCHOOLS FORUMS MEMBERSHIP – MARCH 2025

				<u>VOTING RIGHTS</u>				
SCHOOL MEMBERS				1	2	3	4	5
1.	Maintained Primary School Headteacher (Mandatory)			Y	Y	Y	Y	Y
	Maintained Primary Schools South Headteacher	Catherine Jones – Headteacher	Thorney Close Primary School	<p>No voting rights: the views of the individual Primary Headteacher Clusters Groups will be put forward by the Maintained Primary Schools representative.</p> <p>In the event of the Maintained Primary School Teacher absence a Deputy will be appointed to share the views of the individual Primary Headteacher Cluster Groups.</p>				
	Maintained Primary Schools North Headteacher	Lisa Wood - Headteacher	Hylton Castle Primary School					
	Maintained Primary Schools Washington Headteacher	Sara Bainbridge - Headteacher	Barmston Village Primary School					
	Maintained Primary Schools Hetton/Houghton Headteacher	Nicola Hill - Headteacher	Hetton Primary					
2.	Maintained Special School Teacher (Mandatory)	James Waller – Headteacher: CHAIR	Sunningdale School					
3.	Maintained Nursery Headteacher (Mandatory)	Ailsa Higgins - Headteacher	Hetton Lyons/ Usworth	Y	Y		Y	Y
4.	Maintained Pupil Referral Service Headteacher (Mandatory)	Donna Walker - Headteacher	Link School	Y	Y		Y	Y
5.	Maintained Faith School Headteacher/Representative	Anne Blakey- Headteacher	St Benet's RC Primary School	Y	Y	Y	Y	Y
6.	Maintained Sector School Governor	Michael Hartnack - Governor	Grange Park Primary School	Y	Y	Y	Y	Y
7.	Academy Primary, Infants and Junior	Emma Jarvis – Headteacher (Hetton/Houghton)	Dubmire Primary		Y		Y	Y

SCHOOLS FORUMS MEMBERSHIP – MARCH 2025

8	Academy Primary, Infants and Junior	Audrey Bolam – Headteacher (Washington)	Oxclose Primary		Y		Y	Y
9.	Academy Primary, Infants and Junior	John Lines – Headteacher (Washington)	Columbia Academy		Y		Y	Y
10.	Academy Primary, Infants and Junior	Lauren Reeves – COO (South)	Vision Learning Trust (Hillview)		Y		Y	Y
11.	Academy Primary, Infants and Junior	Ruth Whiteside – Headteacher (South)	Barnes Primary Academy		Y		Y	Y
12.	Academy Primary, Infants and Junior	Mandy Henderson - SBM	Ryhope Infant Academy		Y		Y	Y
13.	Academy Primary, Infants and Junior	Vacant			Y		Y	Y
14.	Academy Primary, Infants and Junior	Vacant			Y		Y	Y
15.	Academy Secondary and All Through	David Amos	Academy 360		Y		Y	Y
16.	Academy Secondary and All Through	Madeline Hope – Director of Finance	Bishop Chadwick Education Trust		Y			Y
17.	Academy Secondary and All Through	Vacant	St Roberts Academy		Y			Y
18.	Academy Secondary and All Through	Vacant	Biddick Academy		Y			Y
19.	Academy Secondary and All Through	Joanne Maw – Chief Executive officer	Aspire Learning Trust		Y			Y
20.	Academy Secondary and All Through	Phil Smith – Chief Finance Officer	Castlevew Academy		Y			Y
21.	Academy Secondary and All Through	Vicki Pinkney - Headteacher	Hetton Academy		Y			Y

SCHOOLS FORUMS MEMBERSHIP – MARCH 2025

22.	Academy Secondary and All Through	Colin Devlin – VICE CHAIR	Kepier Academy		Y			Y
23.	Academy Special (Mandatory)	Mick Little – Chief Operations Manager	Ascent		Y			Y

SCHOOLS FORUMS MEMBERSHIP – MARCH 2025

NON SCHOOL MEMBERS								
24.	Private, Voluntary & Independent Nurseries	David Martin	Chilton Moor Nursery		**		Y	Y
25.	Private, Voluntary & Independent Nurseries	Michelle Barr, Nursery owner and Manger	Buttons Nursery Washington		**		Y	y
26.	Post 16 Provision	Vikki Morton	Sunderland College					Y
27.	Teacher Associations	Andy Lewis						Y
28.	Roman Catholic Diocese	Vacant						Y
29.	Church of England Diocese	Sarah Armstrong	Venerable Bede CE Academy					Y
TOGETHER FOR CHILDREN OFFICERS & COUNCILLORS								
	Head of Accounting & Finance	Deborah Orr						
	Director of Education	Kim Richardson						
	Strategic Service Lead – Education							
	Lead Member Children’s Services	Cllr M Butler						
	Lead Member Children’s Services Deputy – No longer applicable							

MEMBERSHIP VOTING RIGHTS		
1	Scheme for Financing Schools (Maintained)	
2	Schools Block Funding Formula	
3.	De-delegation maintained schools	
4.	Early Years Single Funding Formula	
5.	All other School Forum Decisions	<ul style="list-style-type: none"> a. Central expenditure relating to schools block b. Deficits on central expenditure to be funded from following year’s DSG. c. Voting procedures

SCHOOLS FORUMS MEMBERSHIP – MARCH 2025

- De-delegation maintained secondary removed as no longer pertinent
- ** PVI representatives can vote on the consultation on the funding formula only.

SUNDERLAND SCHOOLS FORUM

Minutes of the Meeting Held on Thursday 6th March 2025 at 8.30 am

School Forum Member Attendance

Voting

James Waller (JW) - Chair	Maintained Special School
Sarah Armstrong (SA)	Church of England Diocese
Michelle Barr (MB)	Private, Voluntary & Independent Nurseries
Ann Blakey (ABI)	Maintained Faith School Representative
Audrey Bolam (ABo)	Academy Primary, Infants and Junior
Colin Devlin (CD)	Academy Secondary and All Through
Caroline Granton on behalf of	Maintained Pupil Referral Services
Donna Walker (CG)	
Michael Hartnack (MH)	Maintained Primary – Governor
Ailsa Higgins (AH)	Maintained Nursery
Madeline Hope (MHo)	Academy Secondary and All Through
Emma Jarvis (EJ)	Academy Primary, Infants and Junior
Catherine Jones (CJ)	Maintained Primary School
Andy Lewis (AL)	Teacher Association
John Lines (JL)	Academy Primary, Infants and Junior
Michael Little (ML)	Academy Special
David Martyn (DM)	Private, Voluntary & Independent Nurseries
Lauren Reeves (LR)	Academy Primary, Infant and Junior
Phil Smith (PS)	Academy Secondary and All Through

Non-Voting

Sara Bainbridge (SB)	Maintained Primary School
Lisa Wood (LW)	Maintained Primary School

Together for Children Officers and Councillors

Kim Richardson (KR)	TfC Interim Director of Education
John Hope (JH)	TfC Technical Accountant Education Funding
Deborah Orr (DO)	TfC Head of Accounting and Finance
Ronnie Lynn (RL)	Interim TfC Strategic Service Manager
Leigh Morris (LM)	TfC Team Manager, School Finance
Pamela Robertson (PR)	TfC Strategic SEND Lead
Gemma Slater (GS)	TfC Trainee Accounting Technician
Alan Rowan	TfC Capital and Sufficiency Lead
Jill Wilson (JWi)	TfC Finance Business Partner
Zena Wilkinson	Schools Forum Clerk

		Agreed Action
25/09	<p><u>Welcome, Introductions and Apologies for Absence</u></p> <p>The Chair welcomed everyone to the meeting.</p> <p>The Clerk advised that apologies for absence had been submitted by Mr Amos, Ms Henderson and Mrs Walker – Ms Caroline Granton was in attendance on behalf of Mrs Walker.</p> <p>The Clerk confirmed a quorum was present and the meeting could proceed to business.</p>	
25/10	<p><u>Declarations of Interest</u></p> <p>MH advised that as an elected Councillor he would declare declarations throughout the meeting, if appropriate.</p> <p>SSF members NOTED:</p> <ul style="list-style-type: none"> - The declarations of interest in relation to the business to be considered. - Declarations could be made throughout the meeting, if appropriate. 	
25/11	<p><u>Membership Proposals</u></p> <p>The Clerk advised that Mr David Airey had submitted his resignation and the Church of England Diocese had put forward a nomination proposal for Sarah Armstrong. Members accepted the nomination.</p> <p>SSF members were advised that Mr Carr was no longer the Headteacher at Biddick Academy and Mr Juric was no longer the Headteacher at St Roberts - the clerk put forward a proposal to remove them from the SSF memberships. Members accepted the proposals.</p> <p>SSF members RESOLVED:</p> <ul style="list-style-type: none"> - To agree the appointment of SA. - To remove AC and DJ as members of the SSF. 	
25/12	<p><u>Minutes of Previous Meeting</u></p> <p>SSF members RESOLVED:</p> <ul style="list-style-type: none"> - To accept the minutes of the Sunderland Schools Forum (SSF) held on 16th January 2025 as a true record. 	
25/13	<p><u>Matters Arising from the Minutes/Agreed Actions</u></p> <p>Matters Arising from the Minutes:</p> <p>Members confirmed they had received a copy of the Action Log prior to the meeting.</p>	

	<p><u>Agreed Actions from the Meeting</u></p> <p>25/05 Reports for Discussion and Decision</p> <ul style="list-style-type: none"> • De-delegation of Trade Union Facility Time <p>The Clerk confirmed levels of delegation had been checked and the Maintained Faith School Headteacher/Representative was entitled to vote on de-delegation proposals.</p> <ul style="list-style-type: none"> • School Block – School Funding Formula 2025/26 <p>JH confirmed arrangements would be implemented to schedule briefing sessions with Headteachers when any School Funding Formula proposals were to be put forward.</p> <p>Action Log</p> <ul style="list-style-type: none"> • 24/37 Feedback from Short Life Working Groups <p>KR highly commended the work being undertaken by Consilium Evolve, in relation to ascertaining whether there were any links to attendance and suspensions with sound and hearing abilities. KR explained Mr Bell was looking at this across the City and had met with a number of representatives to discuss how to take his work forward, as it was felt the outcome of the project could have a positive impact on the waiting list for neuropathway provisions.</p> <p>KR advised SSF members that the project was not a quick fix but provided assurance investigations were ongoing and she would continue to provide feedback as appropriate. KR stated that anecdotal evidence was evidencing links to disruption but a larger data set analysis needed to be taken forward.</p> <p>JW shared that he was uncertain how much this project had engaged with specialist settings, explaining that he was aware that there was a lot of understanding in relation to this which he felt would be beneficial. KR explained that Consilium Evolve was engaged with the ICB and NHS specialists, therefore the project was gaining traction but there were slight nuances.</p> <p>KR advised SSF members that Robert Bell and Louise Harris would be key speakers at an Inclusion Conference scheduled to be held on 3rd July 2025, sharing that further conference details would be disseminated in the near future.</p> <p>JW confirmed the remaining actions detailed on the action log were still outstanding.</p>	
25/14	<p><u>Feedback from Short Life Working Groups</u></p> <ul style="list-style-type: none"> • Inclusion <p>Members noted this item had been covered with 25/12 Matters Arising from the Minutes/Agreed Actions.</p>	

	<ul style="list-style-type: none"> • Quality Assurance Processes for Service Providers <p>PR explained that she was working with Vanya Ellis, Commissioning Specialist, Commissioning Team and they were developing a Quality Assurance Framework for service providers, which was to be trialled with New Beginnings. PR explained that this would have a particular focus on alternative providers where children with Education Health Care (EHC) plans were placed and would then be rolled out.</p> <p>PR explained the quality assurance process would include visiting schools who had alternative provisions and pupils based within the Sunderland area, stating that the proposed processes were robust.</p> <ul style="list-style-type: none"> • Delivering Better Value (DBV) <p>PR advised that a detailed update would be presented in the May 2025 meeting, as an end of year review would be undertaken with the Department for Education (DfE) on 27th March 2025.</p> <p>PR explained that a lot of the work would still be ongoing as TfC had committed to specific arrangements, exemplifying staffing.</p>	PR
25/15	<p><u>Presentations</u></p> <ul style="list-style-type: none"> • Growth and Falling Rolls <p>SSF Members confirmed they had received a copy of the following report prior to the meeting for consideration:</p> <ul style="list-style-type: none"> ➤ Growth Fund Report: 2024/25 – 2025/26 <p>Mr Rowan explained that the information provided was more of an update rather than presentation.</p> <p>Mr Rowan explained that the Schools Revenue Funding 20/21 Operational Guide allowed Together for Children (TfC) to operate a Growth Fund, which covered pupil numbers across the City.</p> <p>Mr Rowan explained that the data detailed within the report was largely following legacy increases.</p> <p>Mr Rowan brought SSF Members attention to subsection 3.2, explaining that this set out the funding for 2024/25 for primary sector legacy growth:</p> <ul style="list-style-type: none"> - Benedict Biscop CE Academy 15 places - St Pauls CE VC Primary 15 places - Hetton Primary School 5 places - Willow Wood Primary School 10 places <p>Mr Rowan advised that the overall funding for 2024/25 was £152,343, which was based on the need for children on roll from the October census.</p>	

Mr Rowan reported that during 2025/26 there were no expectations for new placements to be required, however given the fluctuation within pupil numbers due to new international students a further 15 places were retained as a contingency to respond to any unplanned growth in pupil numbers in other areas of the City.

Mr Rowan reported that there were no secondary school place expansions planned for 2025/26, however it was recommended that the equivalent to one class (30 places) was retained as contingency with a further 30 primary places retained:

Requirement	No of Places	Cost
Primary Places Required September 2025	65	£242,923
Secondary Places Required September 2025	30	£216,129
Projected DSG required for Growth Fund 2025/26		£459,052

Mr Rowan advised SSF Members that any funding not utilised would be returned.

MH thanked Mr Rowan for the information provided and noted the Riverside development plans and queried if this development would include a new build. Mr Rowan advised that the application for Farringdon Row had just been submitted and was not approved, sharing that the only housing developments were the City Centre site and Vaux developments. Mr Rowan stated that he was uncertain whether a new build would be required from the pupil number data. Mr Rowan advised that a nursery provision may be a larger requirement, in line with Government changes, but explained if a new build was required this would only be a one form entry school.

Following a vote SSF Members RESOLVED:

- To approve the final primary and secondary funding allocations for 2024/25, as presented.
- To approve the projected Growth Fund requirement for 2025/26, as presented.

25/16

Reports for Discussion and Decision

- School Forum Membership/Terms of Reference

SSF Members confirmed they had received a revised copy of the SSF Membership/Terms of Reference prior to the meeting for consideration.

The Clerk confirmed the only proposed change was the voting rights of the Maintained Faith School Headteacher/ Representative in relation to voting rights for de-delegation. MH queried if this was correcting an error on the initial Membership/ Terms of Reference and the Clerk confirmed it was, extending her apologies for the error.

	<p>Following a vote SSF Members RESOLVED:</p> <ul style="list-style-type: none"> - To ratify the SSF Members/Terms of Reference as presented. 	
25/17	<p><u>Any Other Business</u></p> <ul style="list-style-type: none"> • SSF Induction <p>SSF Members were advised that the SSF Induction, scheduled to be held on Friday 7th March 2025, had been cancelled and would be rescheduled in the near future.</p> <ul style="list-style-type: none"> • Transitions within Nursery Settings <p>CJ shared that she had recently had a pupil transfer from her nursery provision and she had received a request from the new service provider to reimburse funding allocated. CJ explained that she had tried to gain clarification around this procedure and was advised it was detailed within provider agreements but was not always implemented. CJ questioned if this process could be clarified. JH confirmed these request occurred but shared that the overall process was “woolly”, stating that he would expect settings to invoice/charge if pupils transitioned into their settings. JH agreed to forward details to CJ, stating that this process should be detailed in provider agreements. CJ stated that she was uncertain whether this proviso should have been included if it was not agreed by all. JH acknowledged other Local Authorities had differing arrangements but agreed to discuss the concerns with Nicola Wardropper, Childcare Team Lead.</p> <ul style="list-style-type: none"> • Elective Home Education (EHE) <p>MH noted that following the death of Sara Sharif the Government was going to implement work around home schooling. MH questioned whether any lessons had been learned from this incident and queried the number of children being home schooled and safeguarding arrangement. KR stated that from a strategic perspective TfC were already looking at EHE as they were aware of the impact in terms of disrupted education and children being at risk from other sources. KR advised that the number of children being EHE'd had substantially increased, to 500, stating that the numbers had increased exponentially since the Covid pandemic.</p> <p>KR acknowledged that the SSF had agreed to fund a small EHE Team, pending a new School Bills which would strengthen monitoring arrangements for EHE, but explained statutory guidelines at the current time did not provide TfC with a great deal of authority in terms of monitoring etc.</p> <p>KR explained that an EHE Co-Ordinator had been appointed, their role included co-ordinated discussions between families and schools, and a qualified Teacher, and their role was to ensure the child was being educated appropriately.</p> <p>KR shared that there were concerns the proposed new legislation would not provide enough powers in terms of EHE but provided</p>	<p>JH</p> <p>JH</p>

assurance TfC were aware of the need to link with safeguarding, sharing that she and RL were working with the Safeguarding Children's Partnership. KR provided assurance EHE was high on the agenda and work was being undertaken across partnerships and Children's Services, sharing that marginal gains had already been made.

RL explained that the Safeguarding Children's Partnership was not just across Sunderland and confirmed EHE processes were being looked at closely, sharing that he had a report to prepare in relation to this. RL shared that he was aware regional groups were also looking at EHE.

SSF Members were advised that the Ofsted Inspectors involved in the Inspecting Local Authority Children's Services (ILACS) had tested data and the Ofsted Report would be published in the near future.

RL provided assurance that progress was being made in relation to EHE, explaining that in relation to "Mind of My Own" consideration was being given to rolling this out of EHE pupils, should they wish to share any safeguarding concerns. RL explained that process were also being considered to ensure EHE children received access to Health Services school pupils would normally receive.

Abo noted that there were no options to gather the voice of EHE pupils, stating that she believed this was important. KR agreed with this comment but explained that this was one of the difficulties within the current legislation for EHE, as it was a parental right to remove a child from roll. KR shared that she was aware people were lobbying for children's rights and it was hoped the new legislation would provide more rights to inspect EHE placement arrangements. KR explained that expectations for home visits to be undertaken were not detailed within the current legislation.

RL confirmed the current legislation did not support the monitoring of EHE arrangements and suggested this was considered as a topic within the next Inclusion Forum. RL advised SSF Members that an EHE Team member did try to schedule visits when parents were considering EHE.

RL extended an open invitation for SSF Members to contact him should they have any queries in relation to EHE.

- Special Educational Needs/Ofsted

JW explained that he attended a variety of national and regional meetings, which met with DfE representatives, and had extended an offer to attend Primary and Secondary Headteacher forums. JW shared that he had attended a Secondary Headteacher meeting and some of the issues discussed were around accountability and Ofsted: issues/views shared within the meeting were fed back and JW stated that he believed feedback was having an impact.

	<p>JW shared that he was aware schools had been invited to participate in an pilot of the new Ofsted Inspection Framework and this offer had not been take up widely within the region – JW extended an open invitation for Headteachers to contact him directly if they were interested in taking forward this offer. JW explained that participating in the pilot would involve a full Ofsted Inspection under the framework but the inspection would not be graded and there would be an emphasis on inclusion within mainstream schools.</p> <p>CD shared that he felt this was problematic, stating that he was uncertain why schools would invite Ofsted to trial a framework to which they were objecting.</p> <p>AL joined the meeting.</p> <p>JW agreed to feedback this comment, providing assurance that any feedback was anonymous, and shared that Headteacher’s had an opportunity to raise concerns by direct feedback.</p> <p>CD shared that there were also concerns about the impact of a “pilot inspection” on both schools and staff. JW provided assurance he would feedback any views shared, advising that at the current time feedback being reported was predominantly positive.</p> <p>JW shared that he was uncertain whether abstaining from the opportunity to participate in the pilot was the best way forward.</p> <p>CJ advised that the Ofsted consultation/pilot arrangements had been raised within the Area Chairs & Vice Chairs forum and Primary Headteacher Cluster meetings and she had not heard of any positive feedback being submitted. CJ stated that as a consultation was being undertaken she believed this should be completed before a pilot was initiated, sharing that she felt the process implemented made a mockery of “proposals”. CJ stated that she felt the who rhetoric of the new Ofsted Framework as “the voice of parents” was an issue, sharing that she felt this was wrong. JW explained that these were the types of views and feelings which needed to be fed back, as there was a need for specific viewpoints. CJ stated that she believed pausing the pilot proposals would be beneficial, as she believed the view was the current consultation was not an open option. JW confirmed this issue had been raised at meetings and within the challenge attendees had been informed that as part of the consultation there was a need for some form of loose framework to be implemented to provide feedback: Ofsted had stated that they had listened to views submitted and designed the framework based on what they felt schools wanted.</p> <p>JW stated that if there were any details of discussions/views it would be beneficial to receive this to provide feedback.</p>	
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25/18	<u>Date and Time of Next Meeting</u> Thursday 22 nd May 2025 at 8.30 am Venue: Meeting to be held virtually	
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Subject To Approval

Schools Forum Action Log

Date of Meeting	Agenda No	Request	Action	Responsible	Date of Completion	Remarks
04-Jul-24	24/37	Feedback from Short Life Working Groups	Consilium Evolve findings following their project to ascertain whether there were any links to attendance and suspensions with sound and hearing abilities to be shared with Forum members	KR	Oct-24	
21/11/2024	24/65	Reports for Discussion and Decision	SM to extend an invitation to Mr P S Wilson, Section 151 Officer, or his representative, to attend a future SF meeting.	KR		
16/01/2025	25/06	Feedback from Short Life Working Groups	SSF Members to contact RL with proposals for the focus of the next Inclusion Forum	Members		
06/03/2025	25/14	Feedback from Short Life Working Groups	PR to provide an update in relation to DBV at the May 2025 meeting	PR		
06/03/2025	25/16	Any Other Business	JH to forward details of the provider agreement content to CJ.	JH		
06/03/2025	25/16	Any Other Business	JH to discuss the provider agreement content (in terms of forwarding funding to new nursery providers) with Nicola Wardropper.	JH		

REPORT TO SUNDERLAND SCHOOLS FORUM

REPORT OF DIRECTOR OF EDUCATION

22 May 2025

Dedicated Schools Grant 2024/25 Final Outturn and 2025/26 Allocation

1. Purpose of the Report

1.1 The purpose of this report is to provide the Schools Forum with the final outturn position in relation to the Dedicated Schools Grant (DSG) for 2024/25, which is subject to external audit, and update on the 2025/26 DSG Allocation.

2. Dedicated Schools Grant final Outturn 2024/25

2.1 Forum members will recall that the draft DSG outturn was presented to the meeting held in January 2025, where it was reported that it was expected the DSG would overspend in year by £6,956,099 in 2024/25. This is before including the deficit Reserve balance as of 31 March 2024 of £9,088,514, which would give an estimated overall DSG Reserve balance as of 31 March 2025 of £16,044,613.

2.2 Forum members will also recall that the DSG is managed holistically rather than block-by-block with a long-established pattern that some blocks may effectively subsidise others across the DSG as a whole.

2.3 The final unaudited overall DSG in year outturn position for 2024/25 is an overspend of £6,960,210, as shown in the table below:

	2024/25 Revised DSG Budget	2024/25 Unaudited Outturn	2024/25 Total Unaudited (Over) / Underspend	Total Projected (Over) / Underspend January 2025
	£	£	£	£
Schools Block	45,185,242	44,126,871	1,058,371	1,053,131
Central Services Block	1,513,177	1,400,454	112,723	88,928
Early Years Block	30,681,127	30,028,391	652,736	137,317
High Needs Block (HNB)	34,515,181	43,299,221	(8,784,040)	(8,235,475)
TOTAL DSG	111,894,727	118,854,937	(6,960,210)	(6,956,099)

Schools Block

- 2.4 School's Block is reporting a final unaudited underspend of £1,058,371 for 2024/25, which represents a £5,240 improvement to the underspend reported in January 2025. The total underspend is due to £866,685 underspend in Growth Funding and £191,686 for Academy converter school rates.

Central Services Block

- 2.5 The Central Services Block shows a final unaudited underspend of £112,723 for 2024/25, which represents a further £23,795 underspend to the position reported in January 2025 due to additional underspend in the Admissions team. The overall underspend of £112,723 relates to underspends in the Admissions Team and Schools historic redundancy budget, which following prior agreement with the Local Authority, can be used to partially offset the overall DSG position.

Early Years Block

- 2.6 The Early Years Block shows a final unaudited underspend of £652,736. This represents a £515,419 improvement from the position reported in January 2025.

The underspend of £270,581 in the Early Years Inclusion fund, along with staffing slippage in the Early Years Team is part of the reason for the overall underspend. There has been minimal spend on Early Years inclusion budget for 2-year-olds and under sector (2024/25 budget £200,000). The anticipated take-up of Inclusion for this sector was unknown at the budget setting stage. As a consequence, the budget for 2025/26 has been realigned to £60,000.

Other underspends within the Early Years block include £222,383 in the Disability Access Fund (DAF) funding, again due to minimal take-up in the 2-year-old and under sector, £350,019 in 2-year-old funding and an overspend of £155,416 in 3-year-old funding.

Adjustments will be made in July 2025 to reflect the change in pupil numbers between January 2024 and January 2025 censuses and it is anticipated that the DfE will claw back approximately £500,000 from the 2-year-old sector with a gain of £300,000 for the 3- and 4-year-old sector.

High Needs Block

- 2.7 As with regional and national experience, the volatility, level of uncertainty and unknown variables in the High Needs Block (HNB) make budget monitoring and predicting the outturn position challenging.

The final unaudited outturn position for the HNB in 2024/25 is an overspend of £8,784,040. The final position is £548,565 worse compared to the position reported in January 2025. The main reasons for the increase in the High Needs Block overspend include an increase in EHCP Top up numbers, additional Commissioned High Needs places and fees paid to Schools and. In addition, there has been an increase in the need for Alternative Education Commissioned places due to Permanent Exclusions. The HNB final outturn is analysed in the table below:

High Needs Block	2024/25 Budget £	2024/25 Final Outturn £	Variance £
Commissioned Places - Special	3,321,232	3,527,168	(205,936)
Commissioned Places – Link School and Alternative Provisions	2,380,000	2,821,987	(441,987)
Commissioned Places - Resource Provisions	484,833	563,954	(79,121)
Teachers Pay & Pensions Grant £660 per place	855,184	831,919	23,265
Top Ups	15,690,000	21,170,222	(5,480,222)
Top Ups - Post 16	1,800,000	2,025,582	(225,582)
Virtual School	416,778	342,874	73,904
Residential - Non-Maintained Independent	6,005,464	8,893,078	(2,887,614)
Retained HNB	3,561,690	3,122,437	439,253
Total HNB - Together for Children	34,515,181	43,299,221	(8,784,040)

Use of Reserves

- 2.8 As referenced in paragraph 2.3, the final DSG in year outturn position for 2024/25, but subject to audit, is an overall overspend of £6,960,210. This overspend will be carried forward as a deficit DSG Reserve to 2025/26 along with the adjusted deficit Reserve balance as of 31 March 2024 of £9,088,514, giving an overall DSG Deficit Reserve of £16,048,724. Note the DSG Reserve balance as at 31 March 2024 was £9,070,410 then adjusted by £18,104 for Early Years Pupil numbers for 2023/24 advised by DFE, as noted in School Forum DSG Projected outturn report on 19 September 2024.
- 2.9 Appendix A provides a summary position of the 2024/25 budget and final outturn.

Council Statement of Accounts

- 2.10 As part of the Statement of Accounts the Local Authority is required to include a note (shown overleaf) within its accounts, which demonstrates that the DSG has been deployed in accordance with regulations (subject to audit). The note and this report will be included in returns to be made to the DfE on the use of the DSG and use of reserves.

394 Sunderland		Cells requiring input		
Details of the deployment of DSG receivable for 2024/25 are as follows:				
Notes		Central expenditure	Individual schools budget	Total
A	Final DSG for 2024/25 before academy and high needs recoupment			295,126,793
B	Academy and high needs figure recouped for 2024/25			182,275,185
C	Total DSG after academy and high needs recoupment for 2024/25			112,851,608
D	Plus: Brought forward from 2023/24			0
E	Less: Carry-forward to 2025/26 agreed in advance			
F	Agreed initial budgeted distribution in 2024/25	68,112,090	44,739,518	112,851,608
G	In-year adjustments	-18,104	33,978	15,874
H	Final budget distribution for 2024/25	68,093,986	44,773,496	112,867,482
I	Less: Actual central expenditure	75,072,299		75,072,299
J	Less: Actual ISB deployed to schools		44,773,496	44,773,496
K	Plus: Local authority contribution for 2024/25	0	0	0
L	In-year carry-forward to 2025/26	-6,978,313	0	-6,978,313
M	Plus: Carry-forward to 2025/26 agreed in advance			0
N	Carry-forward to 2025/26			0
O	DSG unusable reserve at the end of 2023/24			-9,070,410
P	Addition to DSG unusable reserve at the end of 2024/25			-6,978,313
Q	Total of DSG unusable reserve at the end of 2024/25			-16,048,723
R	Net DSG position at the end of 2024/25			-16,048,723

3. Dedicated Schools Grant 2025/26

- 3.1 Appendix B provides a summary of the 2025/26 DSG Allocation position. Note Schools Forum approved the transfer of 0.5% from the Schools Block to the High Needs Block of £1,156,212. Below is a summary of the 2025/26 DSG Allocations after the 0.5% transfer and deductions for Academy Recoupment:

	2025/26 DSG Allocation £
Schools Block	47,684,140
Central Services Block	1,547,972
Early Years Block	40,023,608
High Needs Block (HNB)	38,496,181
TOTAL DSG	127,751,901

- 3.2 Note the Early Years block 2025/26 has significantly increased by approximately £9.3m compared to the 2024/25 budget due to new allocations for 2-year-old working parent entitlement and under 2-year-old entitlement.
- 3.3 The overall High Needs Block allocation (after Academy recoupment) for 2025/26 has increased by £3,981,000 from the 2024/25 final allocation, which represents an 11.53% increase. Appendix B below provides a summary of 2025/26 DSG Budget.

Given the HNB overspend in 2025/26 was £8,784,040, Schools Forum members will appreciate once again it is extremely difficult to set a balanced in year HNB budget for 2025/26 if budgets are to be set based on 2024/25 final HNB spend including any known inflationary factors from April 2025. Therefore, as in previous years, budgets for 2025/26 have been set using varying percentage reductions in projected spend in order to set the overall DSG budget to balance to ESFA 2025/26 DSG Allocation of £127,751,901 after academy Recoupment.

TfC will provide regular updates to Schools Forum with a projected DSG Outturn position and SEND Delivering Better Value outcomes during 2025/26.

Recommendations

Schools Forum is recommended to:

- i. Note the contents of the report.
- ii. Approve the carry forward of the overall DSG deficit sum of £16,048,724 from 2024/25 to 2025/26.
- iii. Agree to receive regular updates on the 2025/26 projected outturn position and plans to mitigate the deficit brought forward.

If you have any queries in relation to the above report, please contact:

kimberley.richardson@togetherforchildren.org.uk
deborah.orr@togetherforchildren.org.uk or
debra.dixon@togetherforchildren.org.uk

2024/25 DSG FINAL OUTTURN					APPENDIX A	
	Schools Block	Central School Services Block	High Needs Block	Early Years Block	Total 2024/25 BUDGET	
	£		£	£	£	
Funding Settlement 2024/25 (includes Pay & Pensions)	217,622,478	1,495,738	44,534,251	30,445,491	294,097,958	
Rates Deduction	(1,821,205)		0		(1,821,205)	
Central Teachers & AP provision Pay/Pension Grant			181,759		181,759	
Additional HNB Funding NEW 23/24					0	
Less import/Export adj for High Needs block			(408,000)		(408,000)	
Free Special Schools funding			1,002,000	0	1,002,000	
Total DSG (Before High Need Deductions)	215,801,273	1,495,738	45,310,010	30,445,491	293,052,512	
Less Academy Recoupment high Needs places			(11,873,835)		(11,873,835)	
Early Years Adjustment 24/25				(75,456)	(75,456)	
Early Years 2 Year old pupil No adj Nov 24				(360,960)	(360,960)	
Early Years 2 Year old pupil No adj Mar 25				672,052	672,052	
Increase in CSSB Unit of funding		17,439			17,439	
	215,801,273	1,513,177	33,436,175	30,681,127	281,431,752	
Transfer from Schools Block to High Needs block	(1,079,006)		1,079,006		0	
Total Adjusted DSG (Before Academy Recoupment)	214,722,267	1,513,177	34,515,181	30,681,127	281,431,752	
Academy Recoupment	(169,537,025)				(169,537,025)	
Total DSG & YPLA After Schools recoupment	45,185,242	1,513,177	34,515,181	30,681,127	111,894,727	
Local Authority					Total Budget	Projected Spend
Schools Block Breakdown						(Over)/ Underspend
Maintained Schools Budgets - Primary	43,782,638				43,782,638	43,782,734
Maintained Schools Budgets - Secondary	0				0	0
NEW Delegation Union Facility	26,932				26,932	26,932
Academy Recoupment Rates Saving	191,337				191,337	(445)
ESG Transfer into DSG - Retained functions		583,000			583,000	583,000
Admissions Team		15,000			15,000	15,000
Termination Of Employment Costs		80,282			80,282	0
Growth Fund	1,184,335				1,184,335	317,650
Copyright Licencing		273,499			273,499	273,498
Total DSG - Local Authority	45,185,242	951,781	0	0	46,137,023	44,998,369
						1,138,654
Together for Children						
CSSB Retained including Schools Forum & NMIS Fees No EHCP		346,820			346,820	345,868
SACRE		13,000			13,000	13,000
Teachers Pensions Grant-Retained Teachers		48,576			48,576	48,576
Admissions Team		153,000			153,000	121,511
Commissioned Places - Special			3,321,232		3,321,232	3,527,168
Commissioned Places - Link School & Alternative Provisions			2,380,000		2,380,000	2,821,987
Commissioned Places - Resource Provisions			484,833		484,833	563,954
Teachers Pay & Pensions Grant £660 per place			855,184		855,184	831,919
Top Ups			15,690,000		15,690,000	21,170,222
Top Ups - Post 16			1,800,000		1,800,000	2,025,582
Virtual School			416,778		416,778	342,874
Residential - Non Maintained Independent			6,005,464		6,005,464	8,893,078
Retained HNB			3,561,690		3,561,690	3,122,437
3&4 Year old				10,137,048	10,137,048	10,284,928
Additional hours 3 & 4 year olds				5,110,554	5,110,554	5,110,554
Pupil Premium 2, 3 & 4 year olds				523,238	523,238	574,927
Additional Nursery funding				1,322,400	1,322,400	1,357,231
Retained by LA 5%				800,000	800,000	725,848
2 year olds				3,523,019	3,523,019	3,102,771
2 Year old working parents entitlement NEW 24/25				4,376,537	4,376,537	4,289,974
Under 2 Entitlement NEW 24/25				3,864,371	3,864,371	3,977,009
SEN inclusion				700,000	700,000	503,570
Disability allow				323,960	323,960	101,577
Total High Needs Block	0	561,396	34,515,181	30,681,127	65,757,704	73,856,567
						(8,098,863)
Total Adjusted DSG	45,185,242	1,513,177	34,515,181	30,681,127	111,894,727	118,854,937
						(6,960,210)
						DSG Deficit Reserve Balance 31/3/24
						(9,070,410)
						Early Years 2023/24 Pupil No Adj to Reserve Balance
						(18,104)
						Projected DSG Deficit Reserve Balance 31/3/25
						(16,048,724)

2025/26 DSG Funding as at May 2025					APPENDIX B
	Schools Block	Central School Services Block	High Needs Block	Early Years Block	Total 2025/26 BUDGET
	£		£	£	£
Funding Settlement 2024/25 (includes Pay & Pensions)	233,241,634	1,547,972	49,604,211	40,023,608	324,417,425
Rates Deduction	(1,999,210)		0		(1,999,210)
Central Teachers & AP provision Pay/Pension Grant			181,759		181,759
Additional HNB Funding NEW 23/24					0
Less import/Export adj for High Needs block			(408,000)		(408,000)
Free Special Schools funding			0	0	0
Total DSG (Before High Need Deductions)	231,242,424	1,547,972	49,377,970	40,023,608	322,191,974
Less Academy Recoupment high Needs places			(12,038,000)		(12,038,000)
Early Years Adjustment 24/25				0	0
	231,242,424	1,547,972	37,339,970	40,023,608	310,153,974
Transfer from Schools Block to High Needs block	(1,156,212)		1,156,212		0
Total Adjusted DSG (Before Academy Recoupment)	230,086,212	1,547,972	38,496,182	40,023,608	310,153,974
Academy Recoupment	(182,402,072)				(182,402,072)
Total DSG & YPLA After Schools recoupment	47,684,140	1,547,972	38,496,182	40,023,608	127,751,901
Local Authority					Total Budget
Schools Block Breakdown					
Maintained Schools Budgets - Primary	46,903,711				46,903,711
Maintained Schools Budgets - Secondary					0
NEW De delegation Union Facility	29,599				29,599
Academy Recoupment Rates Saving	0				0
ESG Transfer into DSG - Retained functions		583,000			583,000
Admissions Team		15,000			15,000
Termination Of Employment Costs		64,226			64,226
Growth Fund	750,830				750,830
Copyright Licencing		356,760			356,760
Total DSG - Local Authority	47,684,140	1,018,986	0	0	48,703,126
Together for Children					
CSSB Retained including Schools Forum & NMIS Fees No EHCP		314,410			314,410
SACRE		13,000			13,000
Teachers Pensions Grant-Retained Teachers		48,576			48,576
Admissions Team		153,000			153,000
Commissioned Places - Special			2,941,079		2,941,079
Commissioned Places - Link School & Alternative Provisions			2,380,000		2,380,000
Commissioned Places - Resource Provisions			625,708		625,708
Teachers Pay & Pensions Grant £660 per place			886,600		886,600
Top Ups			20,413,059		20,413,058
Top Ups - Post 16			1,800,000		1,800,000
Virtual School			415,475		415,475
Residential - Non Maintained Independent			6,010,936		6,010,936
Retained HNB			3,023,325		3,023,325
3&4 Year old				10,305,676	10,305,676
Additional hours 3 & 4 year olds				5,301,028	5,301,028
Pupil Premium 2, 3 & 4 year olds				775,417	775,417
Additional Nursery funding				1,501,950	1,501,950
Retained by LA 5%				800,000	800,000
2 year olds				3,716,328	3,716,328
2 Year old working parents entitlement NEW 24/25				6,673,839	6,673,839
Under 2 Entitlement NEW 24/25				9,895,744	9,895,744
SEN inclusion				700,000	700,000
Disability allow				353,626	353,626
Total High Needs Block	0	528,986	38,496,182	40,023,608	79,048,775
Total Adjusted DSG	47,684,140	1,547,972	38,496,182	40,023,608	127,751,901

REPORT TO SUNDERLAND SCHOOLS FORUM

22nd May 2025

Non-statutory high needs funding for Reception aged children (STEP funding) and high needs exceptional funding requests

1. Purpose of the Report

To propose two additional sources of High Needs funding available prior to the EHCP process to support children with complex needs, which will enable schools to more effectively implement a graduated approach to determine if Statutory Assessment is required.

2. Context

STEP funding: Short Term Exceptional Provision for reception aged children

Infant and Primary Head Teachers have fed back that children can sometimes arrive in their settings with complex levels of needs with minimal transition information. It is envisaged that the ongoing work to support Early Years transitions will reduce the negative impact of this. However, it is acknowledged currently the impact of this is settings can struggle to fund the additional costs of providing high levels of support, whilst undertaking a graduated response and ultimately submitting a Needs Assessment request. From the SEND Service perspective, we are seeing an increase in demand for statutory requests for this age group, in line with the national and regional trends. However, it is often very difficult to be clear about a young child's future learning needs as they are often unable to engage meaningfully in cognitive assessment from Educational Psychologists due to their language delay. We propose to offer schools the chance to apply for high needs funding for the Reception year (up to 3 terms), to better support schools to understand and support children's needs before applying for a Statutory Needs Assessment. Whilst we fully acknowledge for some children, the need for an EHCP will remain apparent, for some they may make significant progress with an enhanced level of support within their reception year.

We expect settings in receipt of this funding to be proactively engaging with all relevant practitioners and services in line with the graduated approach. Use of the funding would be subject to termly review. The funding rates would follow the EYIF funding methodology with a termly award of £2,133 per term for children whose needs can be evidenced at Range 5 in at least 3 broad areas of need and £1040 per term for children with lower levels of need. We would not look to fund children with needs identified below a Range 4 within this funding stream.

Exceptional circumstances funding

We have seen an increase recently in children with often very complex needs moving into the Sunderland area with little or no prior information being shared.

Together for Children acknowledges this can place a genuine strain on the resources of a setting. We are therefore proposing to make available a route by which schools can apply for Exceptional Funding to support children in these circumstances whilst they make the necessary referrals, which will support a Needs Assessment to be carried out. This funding route will be available to children of any year group up to and including Year 11. However, funding can only be applied for in the circumstances where children move into the local area without an EHCP and are presenting with complex needs evidenced at Range 5 or above. Funding will be time limited and subject to ongoing review. Amounts for this funding source will be considered on a case-by-case basis and will only be granted on an exceptional, time limited basis that enables schools to make relevant referrals to services in line with a graduated approach.

3. Financial Implications

For children accessing STEP funding who are not yet 5, we could fund this support from the Early Years block, children who are over 5 at the point of the October census will be funded directly from the High Needs block. For children accessing Exceptional Circumstances Funding we could fund this from the Central Services School block. Some estimations of expenditure based on EYIF referrals from Sept 24 indicate a potential expenditure of in the region of £225,000 for STEP funding and no more than £50,000 for Exceptional Circumstances Funding. In reality, some of the children accessing STEP funding may have been granted top up funding via an EHCP anyway at some point in their reception year so this is not necessarily all additional funding. Furthermore, if some children make sufficient progress due to the enhanced support received, they may not need an EHCP, ultimately creating a saving funding against the High Needs block further down the line. For those children accessing STEP funding who do progress to EHCP we should have better quality information to use to support decisions around future school placement, which supports our strategic objectives under DBV and within our Deficit Management Plan.

4. The proposal

The proposal is from September 2025 there will be a funding application process to enable settings to access both STEP funding and Exceptional Circumstances Funding. The decision-making process will be through Early Years Panel for STEP applications and via the SEND Resource Panel for Exceptional Funding Requests.

Recommendations

School Forum members are asked to:

- (i) Consider and comment on the information provided in the report.
- (ii) Agree to the proposed additional funding streams with effect from September 2025

If you have any queries in relation to the above report, please contact Pamela Robertson, Strategic Lead - SEND, in the first instance.