

# **BIRMINGHAM CITY COUNCIL**

## **BIRMINGHAM SCHOOLS FORUM COMMITTEE**

**THURSDAY, 22 JUNE 2023 AT 14:00 HOURS**  
**IN ON-LINE MEETING, MICROSOFT TEAMS**

### **A G E N D A**

1 **NOTICE OF RECORDING/WEBCAST**

The Chair to advise/meeting to note that this meeting will be webcast for live or subsequent broadcast via the Council's Public-I microsite ([please click this link](#)) and that members of the press/public may record and take photographs except where there are confidential or exempt items.

2 **APOLOGIES**

To receive any apologies.

**3 - 18**

3 **MINUTES– BIRMINGHAM SCHOOLS FORUM - 16 MARCH 2023**

To confirm and sign the minutes of the last meeting of the Committee held 16 March 2023.

**19 - 38**

4 **LA UPDATE**

Report of the Schools Support Manager.

**39 - 42**

5 **REVISED FINANCIAL STRATEGY – DEDICATED SCHOOLS GRANT (DSG) BLOCK RESERVES FORECAST OVER THE MEDIUM TERM**

A report of the Finance Manager for Schools and Fair Funding.

**43 - 44**

6 **WORK PROGRAMME 2023/24**

Report of the Chair of the Schools Forum

**45 - 46**

7 **ANNUAL REVIEW OF MEMBERSHIP**

Report of the Chair of Schools' Forum

8 **ORACLE BRIEFING NOTE**

Verbal report of the Oracle Programme Director.

**47 - 48**

9 **DATES OF MEETINGS**

Report of Committee Services.

10 **OTHER URGENT BUSINESS**

To consider any items of business by reason of special circumstances (to be specified) that in the opinion of the Chair are matters of urgency.

**BIRMINGHAM CITY COUNCIL**

<b>SCHOOLS FORUM 16 MARCH 2023</b>
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**MINUTES OF A MEETING OF THE SCHOOLS FORUM HELD ON  
THURSDAY, 16 MARCH 2023 AT 1400 HOURS ONLINE VIA MS TEAMS**

**PRESENT:-**

Maxine Charles, Maintained Primary Schools Rep  
Kelly Dawes, Academy Rep  
Mike Dunn, Head Teacher (Maintained Secondary School Rep)  
Helen Ellis, Director of SEND and Inclusion – BCC  
Pam Garrington, Maintained Primary Governor  
Malcolm Green, External DSG Advisor, Herefordshire Council  
James Hill, Academies Rep  
Debbie Holmes, Strategic Transformation Lead, Education & Skills  
Councillor Karen McCarthy, Cabinet Member Children, Young People & Families, BCC  
Pauline McKenna, Director of Support Services, Federation of Cherry Oak School, Victoria School & Victoria College  
Kudzai Madzivanyika, Developing Local Provision (DLP) Project Manager  
Mandeep Marwaha, Committee Manager  
Kate Reynolds, Director Lifelong Learning and Employability  
Clare Sandland, LA Officer - Finance Business Partner  
Terry Shaw, BCC Finance Manager  
Chris Wilson, Special Academy Rep

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**WELCOME AND APOLOGIES FOR ABSENCE**

- 16 The Chair welcomed all attendees to the meeting. Prior to the meeting starting, the Chair advised, and the members noted, that this meeting would be uploaded onto the Council's You Tube site. With members agreement, the meeting was recorded.

Apologies were submitted on behalf of Simon Bartlett, Sean Delaney, Claire Henebury (Elinor Warner to represent Claire Henebury), David Room, Jyoti Jaspal (Jackie Howse to represent Jyoti Jaspal).

**The business of the meeting and all discussions in relation to individual reports were available for public inspection via the web-stream.**

**MEMBERSHIP OF THE BIRMINGHAM SCHOOLS FORUM**

- 17 The Membership of Birmingham Schools Forum was shared for information.

Gillian Gregory noted that she sat on two governing boards and the reason she was on the Schools Forum was that she was from Lindsworth and not St Dunstan's. This would be amended.

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**MINUTES – BIRMINGHAM SCHOOLS FORUM 19 JANUARY 2023**

- 18 **RESOLVED**

The minutes of 19 January were updated to read that the Head Teacher City of Birmingham School representing Pupil Referral Unit would be voting against based on the information provided rather than not voting.

Subject to the above note, the public minutes of the last meeting of the 19 January, having been circulated these were agreed by the School's Forum.

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- 19 **MATTERS ARISING FROM THE MINUTES**

**Action (19/01/2023): Page 2, Item 3- Director Lifelong Learning & Employability, the Chair and The Senior Business Analyst to look at the Delegation consultation process.**

A paper had been produced on the issue.

**Action (19/01/2023): Page 3, Item 3- Information regarding the High Needs block for 21/22 and 22/23 to be circulated to the invitees.**

A paper had been produced on the issue.

**Page 4, Action 1:**

**A briefing note on Oracle to be provided at future forum meeting.**

An item would be presented at the Birmingham Association of School Business Management (BASBM) Conference 23 March 2023 to around an Oracle update, the current position and proposed new way of working on this. Following this a paper would be brought to the next Forum in June.

**Action (19/01/2023): Page 4 - Monitoring the impact of and the accountability for the use of the DLP funding to be part of the SEND report at the December meeting. Action Carried forward to the next meeting.**

A presentation had been produced on the issue.

**Schools Forum – 16 March 2023**

**Action (19/01/2023): Page 4 - Director for Education and Early Years to arrange an induction for new Schools Forum members before the next meeting- Induction dates set, invites sent out.**

This had been carried out.

**Page 4, Action 2:**

**Nine tasks were identified around the schools forum during the induction session. A response to these tasks would be shared at the March meeting.**

These had been identified. A verbal update would be given at the meeting.

**Page 4, Action 3:**

**Presentation slides from the induction training to be shared with the members of the forum.**

Some members had received these but not others.

**Action: Committee Services to re-circulate.**

**Action (19/01/23): Page 5: Work programme to be added as a permanent item to the agenda**

An item had been produced on this.

**Action (19/01/23): Page 5: Director Lifelong Learning & Employability to meet with the Chair to discuss strategic approach to management of reserves.**

A paper had been produced on this issue.

**Page 6, Action 5:**

**A paper to be shared with the Schools Forum around the process for de-delegation.**

This would be shared later in the meeting.

**Action (19/01/23): Page 15: Noted a further report to be considered on the use of the former Teachers Pay & Pensions Grant funding following a task and finish co-design workgroup as set out in 5.2 of the report.**

This group was meeting but had not yet reached a conclusion.

**Action (19/01/23): Page 17: A report to be shared at a future meeting around the historic commitments with a view to reducing them over time and to ensure there was no future deficit.**

This had been alluded to in the paper regarding the reserves.

**SEND UPDATE – DELIVERING LOCAL PARTNERSHIPS (DLP) UPDATE**

The following report of the Director of (Special Educational Needs and Disabilities) SEND & Inclusion was submitted: -

(See document No.1)

A presentation was given by the Strategic Transformation Lead and CEO of BEP who have led the DLP project since it's inception.

In addition to the information on the slides it was noted that:

- Broadly the same indicators used by the High Needs Block were used with regard to allocation of funding in terms of prior attainment, deprivation and population. There was a school level allocation for Primary and Secondary and these allocations were allocated into the Consortia and Network allocations.
- Impact on pupil outcomes and wider learnings, from a range of consortia and networks, were shared.
- A school led project related to getting secondary pupils back on school roll was carried out with the Local Authority and Schools which had significant impact on getting children back on to the school roll. Schools had reported termly on this cohort so the progress made by these children could be seen.
- The Special School Outreach Support had been funded by DLP as a school led project.
- Phase 2 of the DLP was aimed at giving schools more security by the allocation of 2 guaranteed years of funding but the funding would end after two years as it was hoped that this work would be sustained as a way of working when the funding ends.

In response to questions, the Board were informed that:

- Helen Ellis reported that the Special School Outreach Support (SSOS) funding would continue for the next two years. However, the actual levels had not been agreed; however it would not be less than £500k.
- A portal on the local offer website had been requested where every DLP project was presented with the impact it had and schools had been creative. It was understood that there had been some issues with developing that part of the website, however this was in process. Schools were being worked with to work out what else could be done to market their projects. Evidence-based practice had always been a criterion for the proposal actions.

### **Schools Forum – 16 March 2023**

- In terms of accountability and more regular monitoring. Monitoring had been done termly and the data had been tracked. Where it had not been what was desired, those partnerships had been challenged. It was recognised that the attendance data and exclusions data was weak which was why this route had been taken and it had been made clear that it had been necessary to make these priorities. It was also currently planned to do visits to every school with an advisor and a specialist officer to heads and Special Educational needs Coordinators (SENCOs) to look at the data and consider where improvement might be needed. These priorities would not only be for the DLP but for every service.
- Contextual data would be rolled out to the leads in the following weeks and to heads in early April and the sooner a bid was in then the sooner the projects could start, following approval.
- In the absence of agreement for Second Year funding, Schools had been nervous about staffing and had been contacting the DLP individually and had been engaged on how they could be supported on staffing issues.
- The pressure of EPs and support services was understood and where people had not been able to access EPs the EPs had been spoken to and they had recommended other people. Initially the EPs and specialist teachers had been asked to allocate time to support DLP, however, things had changed radically following the inspection.
- There has not to date, been a focus or remit within the Local Authority to support and challenge schools on improving performance of SEND CYP. This would need to change so that the performance of children could be focussed on rather than just the provision.
- The practical considerations had been a continuous concern. As such, the pressure on the capacity in the system to meet all needs when people were all doing the same thing were an issue. Monitoring had happened in abundance of DLP, however there was an issue over reporting and who was reported to. As such it was suggested that there should be an agreement on how much reporting and at what level needed to come to Schools Forum.
- In terms of the Local Authority, it was requested that the frequency of feedback is agreed at the outset as all felt it was important to share with Schools Forum on the progress of the DLP. It was important to share what was available on a regular basis at Schools Forum and various other forums so that it could be understood what the data picture looked like for Birmingham in its entirety. There was a lot of information that the Local Authority needed to be better at sharing to work in collaboration. It was also recognised that it was important to share best practice across the city.

- Regarding a question on whether the data on waiting times for mainstream resource bases and special schools, particularly for speech and language therapists, had been reduced – it was agreed this would be followed up. Many of the speech and language projects had been about empowering the schools and training the staff. Helen Ellis reported that the Balance System also needed to be looked at across the city with health colleagues and a detailed presentation brought to the forum. The connectivity with the DLP also needed to be considered to avoid duplication and to ensure clear evidence in terms of the impact and difference.
- Regarding the robustness of the SEND data, there was a comprehensive data set and dashboard of a whole range of SEND data with contextual and performance information that is now available. This could be brought back and shown to the Forum. There were a number of data challenges internally that the Local Authority were trying to address. On the Nexus system there was a lot of cleansing that needed to happen. Data was an area of priority for the authority as it was necessary to measure outcomes and impact. Small data sets were problematic as small bits of data were not so useful. Part of the project was working with consortia in order to work with larger sets of data.

The Chair clarified that whilst it was best practice that the authority provided information on the High Needs Block, this is part of a consultation process and schools forum do not have the authority to make decisions regarding HNB block.

**20      RESOLVED: -**

- (i) That the data on waiting times for mainstream resource bases and special schools, particularly for speech and language therapists be made available to the Forum.
- (ii) That a detailed presentation on the balance system across the city with health colleagues be brought to the Forum.
- (iii) That the dashboard of SEND data including contextual and performance information be made available to the Forum.

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**ADMINISTRATION OF THE BIRMINGHAM SCHOOLS FORUM**

The following report of the Director of Lifelong Learning & Employability, BCC and the Committee Manager was submitted: -

(See document No.2)

The Director of Lifelong Learning & Employability introduced the report and drew attention to paragraph 3.3 which outlined the support that would be



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made available and in particular point vi which outlined which forum members had voting rights. She further drew attention to Paragraph 4 item g, that there would be a memorandum of understanding between Birmingham City Council service areas Committees, Education and Finance to ensure the processes and responsibilities are carried out.

The Committee manager added that the system would be moving over to the Committee Management Information System so the papers would be publicly available. There would be a signpost on the website to indicate that the system had transferred over so that members of the public could find the relevant areas.

**21 RESOLVED: -**

- (i) That members of the Forum note that the administrative support of the Birmingham Schools Forum will be undertaken by BCC Committee Services effective from 16 March 2023.
- (ii) That members of the Forum note that a memorandum of understanding will be drafted and subsequently agreed between BCC Committee Services, Finance and the Education and Skills Teams outlining roles and responsibilities in relation to the production of document packs for future meetings of the forum.

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### **PURPOSE OF THE VARIOUS MEETINGS ASSOCIATED WITH THE BIRMINGHAM SCHOOLS FORUM**

The following briefing note of the Director of Lifelong Learning & Employability, BCC and the Committee Manager was submitted: -

(See document No.3)

She informed the Forum that the Technical Group had proposed that it be disbanded, and a more focussed approach be moved to working groups which could explore a particular area and make recommendations and explore options rather than replicating the work of Schools Forum in the technical group.

**22 RESOLVED: -**

That the recommendations be accepted as follows:

- (i) The number of working groups is limited to one prior to the decision-making meeting in January
- (ii) Items to discuss will include
  - High needs block
  - Minimum funding Guarantee
- (iii) Further working groups may be requested by Local Authority or Schools Forum to discuss other complex funding arrangements or changes to

## **Schools Forum – 16 March 2023**

financial arrangements which may need to be discussed in detail prior to the meeting and require input from subject matter specialist.

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### **LA UPDATE TO INCLUDE SCHOOLS AUDIT OUTCOMES**

The Director of Lifelong Learning & Employability gave a verbal update as follows:

- At the time of the meeting the second day of teachers strikes was under way. Across strike days in Birmingham about 40% of schools were fully open and 60% of schools were impacted in some way.
- In terms of 'Warm Welcome' approximately 10,000 people per week were benefitting from the scheme. It was recommended that schools let families know that if they were cold or feeling other pressures from the Cost-of-Living Crisis they would receive a Warm Welcome in their community library.
- Regarding post-16, the 'not known' figures were the lowest that Birmingham had ever had. NEETs were currently running at 2.8%.
- Regarding audits, the internal audit team had raised that schools had needed to be more robust with their evidence when auditors had come in, in terms of sound judgement and the audit trails to back up the judgement.

In response to a question the Forum were informed that in terms of communication and guidance, it was suggested that the auditors report to the Forum once a year on their audits of schools and that the auditors explain their position to the respective consortia.

#### **23 RESOLVED: -**

That the auditors report to the Forum once a year on their audits of schools and that the auditors explain their position to the respective consortia.

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### **UPDATE ON TASKS FOLLOWING SCHOOLS FORUM INDUCTION SESSION**

The Director of Lifelong Learning & Employability gave a verbal update as follows:

- The historic commitments were the equal pay claim and the funding for Standing Advisory Council for Religious Education (SACRE) which was in the historic commitments box.

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- The box to show whether voting was required and if so by whom would be added to agendas from the June forum onwards.
- Two of three bids for free special schools had been successful. These would create another 500 special school places across the system
- Votes would be recorded going forwards.
- Ways to make reports more accessible in terms of language were being considered.
- A DfE representative had attended the December meeting and had reported that it was a good meeting, and he was pleased with how it had gone.
- Regarding the reference in the regulations to independent schools for pupils with non-SEND, the Director of Lifelong Learning & Employability would find out more and report back to the Forum.
- The scheme of financial management would be taken for an annual update and it would be added to the programme of meetings.

### **24 RESOLVED: -**

That the Director of Lifelong Learning & Employability find out more on regulations to independent schools for pupils with non-SEND and report back to the Forum.

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## **UPDATE ON DFE VISIT TO SCHOOLS FORUM DECEMBER 2022 & RESERVES (FOLLOW UP ON ACTIONS)**

- 25 These issues were covered elsewhere in the agenda.

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## **HIGH NEEDS BLOCK BUDGET PROPOSALS 2023/24**

The following report of the Finance Manager and the Director SEND & Inclusion was submitted: -

(See document No.4)

The report had been through a technical group on 7<sup>th</sup> March. The Forum members were not required to vote or make a decision on the item, however, it was considered best practice for the Forum to be consulted on the issue.

The Finance Business Partner introduced the report and highlighted the following areas:

## **Schools Forum – 16 March 2023**

- The Local Authority was responsible for the setting of the budget and the Schools Forum was consulted.
- The High Needs allocation before recoupment was £270.9m and £237.6m after recoupment. This was an increase of £27.4m gross or £26.9m net from the position notified by DfE in December 2021 for Financial Year 2022/23.
- Additional grant conditions have been added for 2023/24 and a Minimum Funding Guarantee introduced.
- A total of £227.7m or 84.1% of the total allocation was proposed to be allocated for Direct Provision. This was an increase of £25.7m from that provided at this time in 2022/23.
- A further £24.2m or 8.9% of the total allocation was proposed to be allocated for other provision and support services. This was a decrease of £5.7m from that provided at this time in 2022/23. However, 2022/23 the final year of the deficit repayment plan. £4.1m of this related to the deficit repayment plan. From 2023/24 no prior year deficit was required to be budgeted to be repaid.
- The High Needs Block Technical Group met on 7 March where proposals were discussed. All comments raised had been considered and the budget proposals have been amended to build in an additional 25 places at the PRU. A question had been raised about special schools, in 2022/23 they were shown as 45.9% of the total budget and in 2023/24 they were 44.9%. This was due to growth assumed in the 2022/23 budget that did not occur.
- Further changes to the budget proposals would be brought to Schools Forum as and when they were proposed.
- An amendment to the report was brought to the attention of the Forum: There had been an increase in PRU places by 50 based on the number of children not in any form of education.

In response to questions the Forum were informed that:

- Regarding the decrease in percentage spend on provisions for special school resource bases and PRU, this was due to assumed growth that had not yet occurred causing the 2022/23 budget being set higher. When the figures were looked at like-for-like there was an increase of 0.1% for special schools and 0.3% for mainstream.
- Some growth had been considered, including 100 additional places in resource bases. It was thought that more may be needed. Additionally

### **Schools Forum – 16 March 2023**

support elements needed to be considered as well as places in relation to the growth.

- The actual budget allocation would be shared with the Forum in future as well as the percentage increase of each budget and the allocation for supplementary funding.

#### **26 RESOLVED: -**

- (i) That Forum members note the 2023/24 budget proposals for the use of resources received for the High Needs block.
- (ii) That data regarding the reduction in the decrease in percentage spend on provisions for special school resource bases and Pupil Referral Unit (PRU) adjusted for the growth that did not occur be shared with the Forum.

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### **DRAFT FINANCIAL STRATEGY – PROJECTED FORECAST FOR NEXT 3 YEARS (DSG BLOCK BUDGET)**

The following report of the Finance Manager for Schools and Fair Funding submitted: -

(See document No.5)

It was noted that:

- There were four schools blocks and the dedicated main grant was the main grant that local authorities received to pass on to schools. Academies go this funding directly from the Education and Skills Funding Agency (ESFA).
- The dedicated schools grant balance for 2021/22 was £13m across the four blocks. There was a surplus on the Schools Block of £9.1m, on the Central Schools and Services (CSSB) block of £1.7m, on the Early Years block of £2.4m and on the High Needs Block a deficit of £247k.
- The Schools Block and the CSSB block were projected to spend to budget in 2022/23 with the High Needs Block and the early years block yet to be determined.
- The Dedicated Schools Grant (DSG) allocation for 2023/24 was set at £1.4bn. £1.1bn was across the Schools Block, the CSSB block was £8.2m the Early Years Block was £92.4m and the high needs block of £270.9m.

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- An additional DSG grant allocation was expected to be published to support schools with the pressures of financial inflation, increases in energy costs and wider increases in salary costs.
- Regarding the DSG reserves position, the schools block reserve was projected to reduce to £6m in 2023/24 following a drawdown from DSG reserves of £3.1 million to make the Schools Block affordable.
- Discussions were expected to take place with the ESFA in 2023/2024 as most Local Authorities are encountering an in-year Schools Block Deficit.
- A number of discussions had taken place with the DfE and ESFA. The outcome of these would be reported back to the Forum.
- Many local authorities were reporting a deficit for 2023/24.
- Going forward, there were a number of options available for future years, including adjusting the minimum funding guarantee and capping and scaling on pupil-led factors.
- The CSSB reserves were expected to reduce to £1.4m in 2023/24 but were projected to remain in surplus in the medium term.
- The historical commitment pressure on CSSB would need to be addressed beyond 2025/26 as if they continued to be funded as they were, the surplus would be reduced and depleted to zero and a budget for 2026/27 would need to be set where those historical commitments were in agreement with those partners with internal and external stakeholders.

In response to questions the Forum were informed that:

- The funding would be on top of the budget received for the Schools Block. This would be allocated by the ESFA. Publication of what to allocate to each school was expected this month. Money would be allocated in a timely fashion going forward.
- The High Needs block was dealt with differently as the DSG supplement from December included the additional DSG allocation.
- It was difficult to identify over the medium term what the DSG settlements were going to be. As such this was an introductory paper for further discussions going forward as it was necessary to know the outturn positions were across the DSG for 2022/23 before going to the next step. The outturn figures for 2021/22 were still being worked on whilst also preparing for the year-end 2022/23. When the outturn

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figures were available there would be a clearer picture on reserves going forward. The Schools Block was the biggest element of the DSG and it was necessary to understand why many authorities when setting budgets for 2023/24 have found themselves in a position where it was unaffordable. And reserves have had to be used or scaling and capping had needed to be applied. The authorities timetable needed to be worked around and as such an exact date for the outturn figures was not yet known.

- A paper that built up the assumptions to be worked with was needed. Another paper needed to come back to the Forum in June and a working group or task-and-finish group could work together to understand the situation.
- Regarding the drawdown of £3.1m, this was mostly growth funding and falling gross fund. Additional monies had needed to be used in order to fund the explicit and implicit growth. This was not funded through the Schools DSG. More clarity on the drawdown was needed in future reports and decisions made needed to be explicitly referred to.

### **27 RESOLVED:-**

- (i) That the outcome of discussions had taken place with the DfE and ESFA be reported back to the Forum.
- (ii) That a paper outlining the assumptions to be worked with be brought to the Forum in June and a working group or task-and-finish group be worked with to understand the situation.
- (iii) That more clarity on the drawdown be made in future reports and decisions to be more explicitly referred to in future reports.

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## **PROCESS FOR DE-DELEGATION – SCHOOLS FORUM MEMBERS**

The following report of the Finance Manager for Schools and Fair Funding submitted: -

(See document No.6)

It was noted that:

- At last year's forum a consultation to schools had been sent out and one reply had been received. It was then proposed what would be put in the de-delegation rates. Next year it was aimed to get more responses from schools. There was now extra capacity and resources to do this. The consultation results would then be presented to the

## **Schools Forum – 16 March 2023**

Forum at the December meeting to allow a provisional decision to be made with recommendations from the School Finance Team.

- The de-delegation process was to fund school-improvement activities.
- The phases could fund:
  - Additional school improvement services.
  - Contingencies for schools in financial difficulties and deficits of closing schools.
  - Behaviour support services.
  - Support to underperforming ethnic groups and bilingual learners.
  - Free school meals eligibility.
  - Insurance.
  - Risk Protection Arrangement.
  - Museum and library services
  - Staff costs supply cover.
- The Council had set de-delegation rates for contingencies (£15.23 per pupil in 2023/24), facilities time (£4.32 per pupil in 2023/24 in primary and £3.55 per pupil in secondary) and primary behaviour support services (£4.79 per pupil in 2023/24).
- Schools would be consulted in November each year.
- The agreed provisional de-delegation amounts will be inserted into the final APT. This would be presented for decision at the January meeting of the Forum.

The Chair noted that the de-delegation had historically always been informed by the different Forums and there were concerns that if a response was not received from the consultation that the Forum members would not have the necessary information with which to vote on it. Therefore, he recommended that the same processes exist through the forums as well as the consultation.

A further recommendation was made from a Board member that it was necessary to take the knowledge of people looking at a consultation into consideration and whether they were engaged and informed and able to make a representative decision.

### **28 RESOLVED:-**

- (i) That the same processes exist through the forums as well as the consultation.
  - (ii) That the knowledge of people looking at a consultation be taken into account, and it be ensured that they are engaged and informed and able to make a representative decision.
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29     **WORK PROGRAMME 2022/23 REVIEW**

The Chair suggested that in future the January meeting be held in person to facilitate the voting.

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30     **DATE OF THE NEXT MEETING**

The date for the next meeting was to be confirmed.

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31     **OTHER URGENT BUSINESS**

The Chair noted thanks to Julie Beattie, Finance Manager, BCC, for her efforts in support for the Schools Forum.

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# LOCAL AUTHORITY UPDATES – JUNE 2023

## Schools Forum

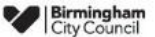
Helen Ellis – Director for SEND and Inclusion

Fiona Chamberlain – Strategic Lead for School Improvement Delivery



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# Agenda

- New Cabinet Members
- Children and Families Senior Leadership Team
- Ofsted Inspections
- SEND:
  - Delivering Better Value Programme
  - Accelerated Progress Plan
  - SEND Free Schools / Sufficiency
  - SENAR
  - Launch of SEND and Inclusion Strategies
- Early Years and Childcare

# New Cabinet Members



Leader of the Council  
Cllr John Cotton



Deputy Leader  
Cllr Sharon Thompson

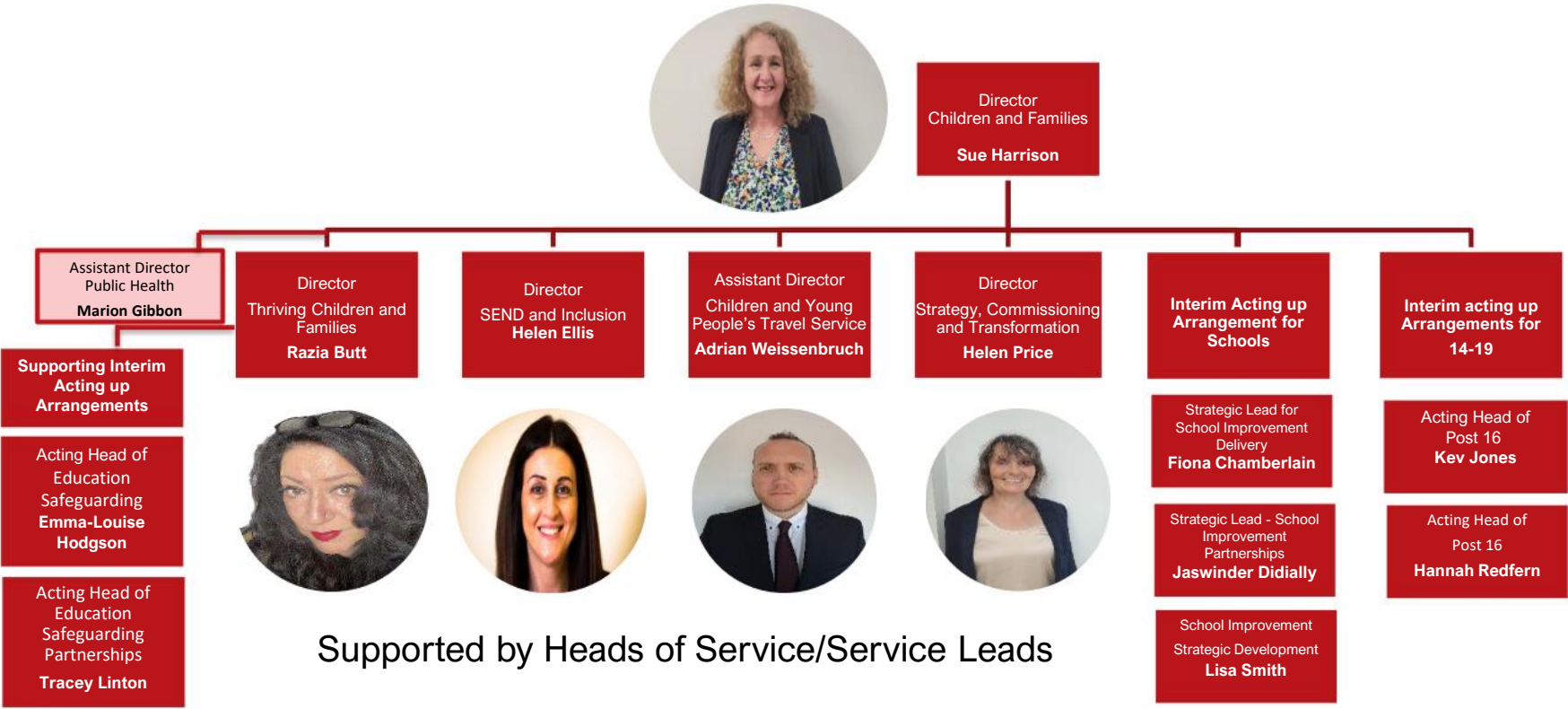


Finance and Resources  
Cllr Brigid Jones



Children, Young People  
and Families  
Cllr Karen McCarthy

# Children and Families Senior Leadership Team



# Ofsted Inspections

- Birmingham's children's services have been judged by Ofsted to be Good in all areas.
- [The report](#) was published in April and the Council's Cabinet formally noted Ofsted's report and the improvements that have been made by the Council and Birmingham Children's Trust.
- Work is underway to prepare for the next local area SEND inspection which will be under the new framework (published November 2022)
- [www.gov.uk/government/publications/area-send-framework-and-handbook](https://www.gov.uk/government/publications/area-send-framework-and-handbook)

# SEND

For further information please contact: Helen Ellis, Director for SEND & Inclusion at [helen.ellis@birmingham.gov.uk](mailto:helen.ellis@birmingham.gov.uk)



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BIRMINGHAM  
CHILDREN'S TRUST





# DELIVERING BETTER VALUE – AN INTRODUCTION



# DBV Diagnostic: The Objective & Approach

## DBV Programme Objective

**Delivering Better Value** (DBV) is a programme working to **identify and implement** local and national opportunities to **improve the outcomes** for children and young people with SEND

In order to achieve this we know;



The child or young person must remain at the centre of everything we do.



We must listen to the challenges from the perspective of those receiving support from the system.



Collaboration is key, with your neighbours, partners and the children and families you support.



Funding is a challenge and key source of frustration that should be considered throughout the planning.

Therefore the DBV programme is designing its support through 2 key approaches;

### Short Term Help

To identify **sustainable changes in each LA** that can drive **high quality outcomes** for children and young people with SEND, and to support you in building an evidence-based **grant application** to assist the implementation of those changes

### Informing Long Term Reform

Build an objective evidence base across a third of the sector, which can be used to:

- **Inform future policy** and reform
  - Build a **national playbook** & share best practice
- to inform **future national programmes** of similar scale and intent

## WHAT IS THE DBV DIAGNOSTIC?

The diagnostic will help you **identify sustainable changes** in your LA that can drive **high quality support and outcomes** for children and young people with SEND, and to support you in building an **evidence-based grant application** to assist the **implementation** of those changes

### Participative Process



The process is designed to engage and excite your workforce, local stakeholders and partners, including parent-carers, children and young people, healthcare providers and education providers

### Tailoring an Evidence Base



The process will give you a bespoke and tailored evidence base to give your ongoing improvement activities the best possible chance of success

### Grant Application



The process is working towards building a grant application for investment to support you through Phase 2 (Implementation)

## HOW IS THE DIAGNOSTIC DELIVERED?

The diagnostic is delivered through a **modular approach**, incorporating training, data analysis and engagement activities

This is not a 'one size fits all' approach – support is **tailored** to each local authority, within this framework, to ensure everyone receives the best outcome

Evaluation & Setup

**Module 1:**  
Baselines and Forecasts

**Module 2:**  
Root Cause Diagnostics

**Module 3:**  
Implementation Planning

Grant Application

### Linking Financial & Operational Performance



From the very **beginning**, you will make use of **your data** to link **financial and operational performance**, to ensure a **sustainable** service can be delivered into the future

### In-Person Training



Tactical training will be delivered within groups of Local Authorities (waves), allowing **multiple local authorities** to come together to **share expertise**, learn from each other and support each other through the process

### Engagement Activities



Case reviews and deep-dive activities will be completed engaging all relevant system stakeholders, allowing a multi-disciplinary and co-productive approach to be taken

# DBV Phase 1: Diagnostic Stages



## Set Up

To understand current position and develop a diagnostic plan

Where Birmingham is now



## Module 1: Baselines and Forecasts

To understand the volume and type of support Children and Young people have received historically, and what this might look like going forward



## Module 3: Implementation Planning

To build findings into effective implementation planning, identifying strengths, enablers and risks



## Module 2: Root Causes Diagnostic

To identify and quantify the highest impact changes that could be made to deliver better outcomes for children and young people

*Lots of different people across the system will be involved at various stages of this process*



## Grant Application

To apply for funding, using the diagnostic work, to support implementation



## Phase 2: Implementation

To start implementing the opportunities and plans identified during the diagnostic

## Engagement Objectives

### The engagement objectives for all groups are:

To make sure that the diagnostic and implementation plans are informed by a wide range of stakeholders who have all had a chance to contribute to and shape the outputs – so using the insight and expertise of these individuals to help make the right decisions.

To enable a representative set of people from all stakeholder groups have had a chance to contribute. To enable them to feel that their contributions have been heard and incorporated into findings and plans wherever possible.

To enable partners and stakeholders to actively participate, throughout the diagnostic and into implementation.

### The identified groups are:

**Children and young people**

**PCFs and wider parent carers**

**Schools**

**Health and social care partners**

Demonstrating engagement with each of these groups will be key to approval of the available grant

# Next Steps

- Watch out for opportunities to engage with the programme
  - Surveys to share opinions from large groups
  - Smaller group listening forums
  - Case reviews to review real examples in detail (taking place in mid September)
  - Updates via schools forum, and through parent carer forums
- Share thoughts via the DBV programme team:
  - Helen Ellis – [helen.ellis@birmingham.gov.uk](mailto:helen.ellis@birmingham.gov.uk)
  - Victor Roman – [victor.roman@birmingham.gov.uk](mailto:victor.roman@birmingham.gov.uk)
- Ensure your colleagues are aware of the programme

# Launch of SEND Strategy and Inclusion Strategy

- Monday, 10 July 2023: Edgbaston Cricket Ground B5 7QU.
- 10:00-12:30 – Celebrating the launch of the Birmingham Inclusion Strategy and SEND Strategy (an event for children, young people and their families).
- 13:00-17:00 – Inclusion Headteacher Conference (for all Primary, Secondary and Special headteachers)

# EARLY YEARS AND CHILDCARE

For further information please contact: Lindsey Trivett, Head of Service at [lindsey.trivett@birmingham.gov.uk](mailto:lindsey.trivett@birmingham.gov.uk)





# Government Announcement – Childcare Expansion

- In the March 2023 Budget the Government announced a significant expansion to the early years and childcare offer currently available to parents and carers.
- The Early Years and Childcare Service are planning a series of sessions end June/early July 2023 to share information on the current thinking and to allow providers from across the sector the opportunity to discuss and share their thoughts on the expanded offer.
- The sessions will provide an opportunity to shape the future administration of the expanded funded offers, inform the ongoing childcare sufficiency strategy, and support childcare providers and schools to make informed decisions regarding their future delivery models.

# THANK YOU!



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# Delivering Better Value in SEND



## Why are we participating in this programme?

To improve outcomes for children and young people with Special Education Needs and Disabilities (SEND) whilst gaining support to deliver sustainable services.

The UK government has long term aspirations to reform the system supporting children and young people with SEND, however these will take time to come into fruition. The DBV Programme acknowledges the current challenges we face and will provide valuable support in the short term to Local Authorities (LAs) like ourselves.

## What makes this Programme unique?

As part of participating in the DBV programme, we will have dedicated capacity from Newton and The Chartered Institute of Public Finance and Accountancy (CIPFA). They will work with us to bring their experience and skills on identifying opportunities for change. This should help our local leaders and managers keep things on track through the inevitable periods of operational pressure.

After our work with Newton and CIPFA, we will have access to grant funding from the Department for Education (DfE) to support our implementation work – enacting positive change for children and young people, our staff and local partners.

We will be progressing on our SEND improvement journey alongside 54 other LAs in this Programme. This will provide us with a unique opportunity for collaboration with other areas. It will also mean we contribute to a wider evidence base that will be fed back to the DfE to inform future national reforms.

## Who are Newton & CIPFA?

**Newton** specialise in operational improvements and have extensive experience in working with public sector systems like ours. They pride themselves in working side-by-side with those leading change – and those most affected by it – to form a single team. Their experience includes analysing complex processes and systems, as well as working with frontline teams to understand the biggest challenges they are facing so they can create a bespoke solution.

**CIPFA** are the only professional accountancy body in the world dedicated exclusively to public finance. They have 14,000 members who work to ensure public money is effectively managed and champion high performance in public services. They have extensive experience working in the police force and with Central & Local Government. Their team of chartered accountants includes experienced Local Government finance directors and officers with a deep knowledge of the education funding system.

## What is the DBV Programme?

This programme is commissioned by the DfE and will support 55 LAs to identify the highest impact changes that each LA involved can make to better support their local children with SEND and make plans to implement those changes. The programme will place children and young people with SEND at the centre of the approach and decision making.

The implementation plans will build on existing initiatives and address the underlying challenges in each LA's high needs systems. We will be involving local partners & our front line staff when designing this plan, ensuring the programme is underpinned by a comprehensive data-driven and evidence-led diagnostic. There is also the opportunity for Local Authorities involved in the DBV Programme to apply for an implementation grant offered by DfE.

## What have we done so far?

Newton & CIPFA have had a planning conversation with our Local Authority's senior leaders to understand our local context and position. We've shared the documentation with Newton and CIPFA that we felt was relevant and discussed areas where their diagnostic support would be helpful.

This was followed by a set up conversation, where we discussed what was required to prepare for next steps in the programme and how best to involve our local partners. The DfE have provided a grant to support data analysis in preparation for the next stages of the programme.

## What are we doing now?

We are carrying out a diagnostic that will take just over 3 months to complete. This diagnostic will be made up of three modules with different partners involved in each to ensure we make the best use of your time and experience.

## What is a diagnostic?

To make impactful change that is sustainable, we need to identify the root cause of challenges - not just the visible symptoms. To do this, we need to be able to step back from our busy day to day lives and gather objective evidence. We will analyse data and combine it with rich insights from our local experience. Newton & CIPFA, who are our partners in this, will work collaboratively alongside us, supporting us with techniques to identify the biggest opportunities to do things better - things that will have the most positive impact for children & young people with SEND.

We will utilise forums to meet throughout the diagnostic, to share progress and ensure that the right people can be involved in shaping the diagnostic work.

To transform our services and make positive and lasting change, we will also consider our culture/how we work together - our strengths, similarities and differences and the impact of these on achieving a sustainable difference to the lives of children with SEND.

## Ways to get involved



### Surveys

Share your experiences through surveys to gather a wide range of views.



### Virtual Drop-Ins

Opportunities for you to hear about what's going on, share views and ask questions.



### Studies

Studies to inform the day-to-day reality of our processes and practice.



### Workshops

Frontline-led discussions about real children – what happened and what we could do differently.

## Why is it important to carry out a diagnostic?

1. To identify sustainable changes that can drive high quality outcomes for children and young people with SEND
2. To enable us to build an evidence-based application to the DfE for a grant to assist with the implementation of those changes.
3. Build a strong, objective evidence base across a third of local authorities, which can be used to influence future national reforms

## What happens after the diagnostic?

The diagnostic is just the first step. The evidence will show us where our biggest opportunities are so that we can plan, prioritise, and build on what we've learnt. There will then be a decision point regarding what to take forward from the diagnostic to incorporate in our improvement plan for implementation.

## How do I get involved?

We know the whole system needs to work cohesively to support children and young people with SEND. Each local partner has valuable insights and experience we want to listen to and understand. These different perspectives will collectively inform our decisions.

Workshops, studies and surveys are just a few of the ways we will be looking to gain this insight. There will be lots of opportunities for you to stay updated and get involved. Some of you will be asked to take part in surveys, others will be invited to attend workshops where we'll discuss anonymised real cases in detail.

It's important we have the right balance of experience and areas of expertise, so we'll be inviting people directly. If you are asked to attend, please do your best to do so. Thank you in advance for taking time out to provide us with your valuable insights. For everyone else, there will be various forums and drop-in sessions where you will be able to share your thoughts, experiences and insights, and of course, to ask questions.

## Who is leading this work & how can we get in touch?

This will be led by our local system leadership, facilitated by our partners from Newton & CIPFA. Our DBV lead will be Helen Ellis, so please reach out with further questions.

**Report to:** Schools' Forum

**Date:** 22<sup>nd</sup> June 2023

**Report of:** Terry Shaw, Finance Manager (Schools and Fair Funding Team)

**Title:** Revised Financial Strategy – Dedicated Schools Grant (DSG) Block Reserves Forecast over the Medium Term

**Status:** For Information

### **Purpose**

The purpose of this report is to inform Schools' Forum of the Dedicated Schools Grant (DSG) Block reserves forecast over the financial medium term of three years.

### **Background**

Schools receive funding via a variety of different funding streams, the main ones being the four blocks of the Dedicated School Grant (DSG), Pupil Premium, Education & Skills Funding Agency (ESFA) Post 16 Funding and Universal Infant Free School Meals.

DSG is the main funding stream for schools and education services and is split into the following four blocks of funding:

<b>DSG Block</b>	<b>Purpose of funding</b>
Schools Block	To fund primary and secondary mainstream schools
Central Schools Services Block (CSSB)	To fund LA functions supporting schools & education
High Needs Block	To fund special schools and resource bases
Early Years Block	To fund nurseries and early years providers

The allocation of DSG funding is governed and managed in conjunction with the Schools' Forum.

## DSG Balances Carried Forward as per the 2021/2022 Statement of Accounts

The DSG balances carried forward as per the 2021/2022 statement of Accounts are shown in the table below:

DSG Block	(Surplus) / Deficit (£)
Schools Block	(9,152,955)
Central Schools Services Block (CSSB)	(1,714,199)
Early Years Block	(2,430,484)
High Needs Block	247,128
<b>Total DSG Carry Forward Balance 2021/2022</b>	<b>(13,050,510)</b>

The Schools Block and CSSB are currently projected to spend to budget in 2022/2023, with the High Needs Block and Early Years Block yet to be determined.

## Dedicated Schools Grant Allocation 2023/2024

The Council's DSG allocation announced by DfE 16 December 2022, is set at £1,457.6m for 2023/2024, which is broken down as follows:

DSG Block	2023/2024 Allocation including Academies Recoupment
Schools Block	1,085,994,147
Central Schools Services Block	8,245,347
Early Years Block	92,454,419
High Needs Block	270,893,581
<b>Total DSG Allocation 2023/2024</b>	<b>1,457,587,494</b>

## Percentage Change in Schools Block DSG from 2021/2022 to 2023/2024

	2021/2022 Allocation (£)	2022/2023 Allocation (£)	Percentage Increase / (Decrease)	2023/2024 Allocation (£)	Percentage Increase / (Decrease)
Schools Block DSG	1,002,106,753	1,031,442,395	2.9%	1,085,994,147	5.3%

The Schools Block DSG increased by 5.3% in 2023/2024 which included NNDR funding of 1.2% following the National Funding Formula (NFF) consultation that took place in 2021-2022 and 2022-2023.

The allocation of £1.086 million in 2023/2024 was budgeted as affordable, but only when using a drawdown from Schools Block reserves of £3.1 million. Following this, projected reserves of £6.0 million remain.



If the Schools Block DSG was to increase by 4.1% (5.3% Total Increase minus 1.2% NNDR) in 2024/25 onwards and pupil led factors increased at a similar rate, then the reserves would be eradicated by 2025/26, with the requirement of £3.1 million being used in 2024/25 thus reducing reserves to £2.9 million and eliminating reserves in 2025/26 in total and creating a cumulative deficit of £0.2 million thus requiring trimming the pupil led factor rates below the NFF rates to break even in 2025/26.

If the Schools Block DSG increased by 4.4% or above in 2024/25 onwards and NFF pupil led factors remained in line with the percentage increases in previous years, then it would be deemed to be affordable with reserves remaining. The additional 0.3% increase would equate to £3.3 million, thus negating the need for the use of reserves.

### **Additional DSG Grant Allocations 2023/2024**

Schools are expected to meet all the pay and inflationary pressures from within their budget allocations.

However, on 16<sup>th</sup> December 2022, the ESFA also published the Mainstream Schools Additional Grant indicative allocations. Birmingham City Council has provisionally been awarded £37.6m funding for schools for the 2023/2024 financial year in addition to the main Schools Block DSG settlement for 2023/2024 to further support schools with the costs of inflation, increases in energy costs and wider increases in salary costs.

For the purposes of forecasting, the additional DSG Grant Allocations have not been included in the three-year forecast as inflation, increases in energy costs and wider increases in salary costs have also been excluded from the calculations. It has been assumed that there will be additional allocations in future years to cover the costs of inflation, increases in energy costs and wider increases in salary costs.

### **Percentage Change in CSSB DSG from 2021/2022 to 2023/2024**

	<b>2021/2022 Allocation (£)</b>	<b>2022/2023 Allocation (£)</b>	<b>Percentage Increase / (Decrease)</b>	<b>2023/2024 Allocation (£)</b>	<b>Percentage Increase / (Decrease)</b>
Historic Commitments	1,441,280	1,153,024	(20%)	922,420	(20%)
Ongoing Responsibilities	6,842,225	7,149,603	4.5%	7,322,927	2.4%
<b>Total</b>	<b>8,283,505</b>	<b>8,302,627</b>		<b>8,245,347</b>	

Previous years' allocations have suggested that the increase in the CSSB ongoing responsibilities allocation for 2024/2025 will remain below 5%. Assuming that any increase will be passed on to the budget holders managing the ongoing responsibilities, CSSB Block reserves are projected to reduce to £1.4 million in 2023/2024 and are projected to remain in surplus over the medium term to the end of the financial year 2027/2028 as per the table below.

	23/24 £m	24/25 £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m
TOTAL PROJECTED CSSB DSG RESERVES BROUGHT FORWARD	1.714	1.439	1.367	1.147	0.809	0.377
TOTAL RESERVES PROJECTED TO BE USED IN YEAR	(0.275)	(0.072)	(0.220)	(0.338)	(0.432)	(0.548)
TOTAL PROJECTED CSSB DSG RESERVES CARRIED FORWARD	1.439	1.367	1.147	0.809	0.377	(0.171)

Historical commitments will need to be revised beyond this to ensure that spending is reduced in line with the annual 20% reduction in funding to ensure that upon the eventual depletion of reserves, the DSG allocation is sufficient to fund the CSSB ongoing responsibilities.

In order to fund the 20% reduction in historic commitments from ongoing responsibilities in 2024/25 without the use of reserves would require an additional £0.072 million and a reduction in the ongoing responsibilities in real terms in 2024/25 and an additional £0.22 million in 2025/26 to avoid the use of reserves.

#### **Early Years Block and High Needs Block**

The Early Years Block and High Needs Block reserves are still to be determined.

**Report to: Schools' Forum**

**Date: 22<sup>nd</sup> June 2023**

**Report of: Chair of Schools' Forum**

**Title: Forward Plan 2023-24**

## **DRAFT SCHOOLS' FORUM WORK PROGRAMME 2023-24**

### **Thursday 26 October 2023 Meeting 2-4pm**

1. Elect the chair and vice chair
2. Review the academy representation on the forum
3. Schools Forum Constitution Review
4. LA update
5. Induction
6. DSG Outturn 2022-23
7. De-delegation consultation process and timelines
8. SEND Update
9. Birmingham schools budget proposal- 2024/25
  - To receive proposals for consultation on the 2024/25 schools budget
  - e.g De-delegation, Education Management charges
7. To receive proposals for the CSSB budget to meet the 20% reduction Historic Cost funding
8. Work programme 2023/24 Review

### **Thursday 7 December 2023 Meeting 2-4pm**

1. Membership and Term of Office
2. LA update
3. SEND Update
4. Falling pupil & Growth Fund
5. CSSB Provisional budget for 2024/25
6. De-delegation and Education management charges

### **Thursday 18 January 2024 Meeting 2-4pm**

1. Membership and Term of Office

2. LA update
3. SEND Update
4. Dedicated Schools Grant (DSG) settlement and to approve the DSG Schools Block Budget / Authority Proforma Tool (APT) for 2024/25
5. To agree commissioned numbers for special schools and resource bases
6. To agree the Early Years funding formula and central costs for 2023/24
7. Finalise Central Schools Services Block (CSSB) budget 2024/25

**Thursday 11 April 2024 Meeting 2-4pm**

1. Membership and Term of Office
2. LA update
3. High needs budget proposals 2024/25

**Thursday 13 June 2024 Meeting 2-4pm**

1. Membership and Term of Office
2. LA update
3. SEND Update
4. DSG Outturn 2023-24
5. DFE consultation papers
6. Timetable for next 12 months

Name	Elected / Appointed by	School / Organisation
Claire Henebury	Nursery Head Teachers Group	Garretts Green Nursery School
Maxine Charles	Primary Heads Forum	Hall Green Junior School
Anna Pendleton	Primary Heads Forum	Rednal Hill Infant School
Vicky Nussey	Primary Heads Forum	Paget Primary School
Mike Dunn	Secondary Heads Forum	Swanshurst School
Denise Fountain	Birmingham Special Schools Head Teacher Association	The Dame Ellen Pinsent School
Sean Delaney	Governors of nursery schools	Bham Federation of Nursery Schools
Catherine Griffiths	Governors of primary schools	The Oaks Primary School
Pam Garrington	Governors of primary schools	Moor Hall Primary School
Makeda Jeffers	Governors of primary schools	St Teresa's Catholic Primary School
Simon Bartlett	Governors of secondary schools	Kings Norton Boys' School
Mashuq Ally	Governors of secondary schools	Bordesley Green Girls' School
Gill Gregory	Governors of special schools	St Dunstan's Catholic Primary School
David Room	Teacher associations	National Education Union

Schools Forum Membership list as of 03.04.2023

Janet Dugmore	School support staff associations	Unison
Cllr Karen McCarthy	Cabinet Member responsible for education	Birmingham City Council
Daniel Locke-Wheaton	Reps of 16 to 19 providers	Aston University Engineering Academy
Hannah Redfern	Reps of 16 to 19 providers	Aston University Engineering Academy
Jyoti Jaspal	PVI Early Years providers	Little Folks / Mishi Nurseries
Jackie Howse	PVI Early Years providers	Twinkle Tots Nursery
Rebecca Nash	Faith groups' bodies in schools/ academies with a religious character	St Brigids and St Columbas
James Hill	Proprietors of mainstream academies	DRB Ignite Multi Academy Trust
Les Lawrence	Proprietors of mainstream academies	
David Worledge	Proprietors of mainstream academies	Washwood Heath Multi Academy Trust (WHMAT)
Chris Townsend	Proprietors of mainstream academies	
Chris Wilson	Proprietors of special academies	Education Impact Academy Trust (EIAT)
Steve Howell	Pupil Referral Unit leadership team	City of Birmingham School

# Birmingham City Council

## Schools Forum

22 June 2023



**Subject:** Provisional Schools Forum dates for 2023/2024

**Report author:** Ed Brown  
Committee Officer  
[edmund.brown@birmingham.gov.uk](mailto:edmund.brown@birmingham.gov.uk)

Does the report contain confidential or exempt information? ☐ Yes ☒ No

If relevant, state which appendix is exempt, and provide exempt information paragraph number or reason if confidential:

### 1 Summary

- 1.1 To agree the provisional dates for meetings of the Schools Forum in 2023/2024.
- 1.2 The proposed dates for Schools Forum meetings have been planned to avoid school holidays and major religious festivals.

### 2 Recommendations

- 2.1 That the provisional dates for meetings of the Schools Forum in 2023/2024 as set out in the report be agreed.

### 3 Provisional Dates for Meetings of the Schools Forum

- 3.1 The provisional dates set out below are based on the usual pattern of meetings as far as possible.

3.2 To be held on Thursdays at 1400 hours.

<b><u>2023</u></b>	<b><u>2024</u></b>
26 October	18 January
7 December	11 April
	13 June

**4 Appendices**

4.1 None.