

## Schools Forum – 8 October 2024

<b>Title:</b>	Schools Forum Working Group re-establishment
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<b>Summary</b>	
<p>We are looking to re-introduce the Schools Forum Working Group (SFWG) that has historically looked at budget activity.</p> <p>The Dedicated Schools Grant (DSG) is received each year from the Department for Education, it is then distributed via the budget setting process across the City of Nottingham. We welcome input and consultation from all members of the forum into this budget setting process and believe that a working group can be helpful in this process.</p> <p>This report sets out Terms of Reference (ToR), proposed membership, and a proposed work programme that considers the current challenges faced by schools and settings within the City of Nottingham.</p>	
<b>Recommendations:</b>	
<b>1</b>	To approve the Schools Forum Working Group Terms of Reference and membership (as per appendix A and section 2.2 below).
<b>2</b>	To note the proposed work programme (as per appendix B).
<b>3</b>	To request members to volunteer to join this Schools Forum Working Group.

### **1. Reasons for recommendations**

- 1.1 The recommendation will support the re-establishment and use of the SFWG on a more formal basis, undertaking the financial reviews required to support the development of school budgets, and development of future funding models and initiatives e.g. replacement of AP model.
- 1.2 The Schools Forum - Operational and good practice guide March 2021 states: *It’s open to a schools’ forum to set up working groups of members to discuss specific issues, and to produce draft advice and decisions for the schools forum itself to consider. The groups can also include wider representation, for example, an early year’s reference group can represent all the different types of provider to consider the detail of the early years single funding formula. The reference group would then be able to give its considered view on the local authority’s proposals to the school’s forum. The school’s forum should not delegate actual decisions or the finalisation of advice to a working group, as this may have the effect of excluding legitimate points of view. These have proved effective for larger local authorities; examples of some working groups are for high needs and early years.*

- 1.3 This working group will have no formal decision-making powers and is set up as a consultative group of Forum, with findings / recommendations being submitted to / agreed at full Forum.

## **2. Background (including outcomes of consultation)**

- 2.1 Looking ahead there are a number of financial issues which will require a more detailed discussion with Forum e.g., the AP Inclusion Model is no longer encouraging inclusion within our secondary schools, and a lack of inclusion is becoming more prevalent across the wider age ranges. This is an area where consideration is needed as to how best to proceed to deliver quality inclusion and as a result – how best to fund it.

This is not the only area where consideration is needed and therefore the use of the SFWG is expected to empower:

- a detailed analysis/discussion of these issues to be undertaken.
- the ability to undertake detailed consultation regarding budget issues and proposed projects and initiatives.
- a more detailed understanding of the budget to be gained by Forum members.
- recommendations to be presented back to Forum that have been agreed at the SFWG. This prevents Forum having to undertake lengthy detailed operational discussions, ensuring that Forum time is focused on more strategic educational issues.

- 2.2 To ensure all sectors are represented on the working group, membership will be:

- The working Group will appoint a Chair who is also a member of Schools Forum.
- A maintained primary sector representative.
- An academy primary sector representative.
- An academy secondary sector representative.
- A special school representative
- A PRU representative
- A Trade Union representative
- An Early Years representative
- A Post 16 provider representative

A senior local authority finance officer will be a joint Lead Officer for the SFWG, working collaboratively with a Senior Education Officer

Other local authority finance officers and other officers, and/or Forum representatives, and/or school and setting representatives will be invited to working group meetings as is appropriate to the discussion(s) or bench marking to be undertaken.

## **3. Other options considered in making recommendations**

- 3.1 Not establishing a SFWG could / would prevent the detailed discussions required on certain budget issues to be undertaken.
- 3.2 Establishing a SFWG allows for consultation and wider consideration to be given to initiatives and projects. For example, a decision could be taken by the Schools Forum

voting to accept and adopt a report by a working group after the group has met to discuss, consider and recommend a preferred use of the DSG.

#### **4. Outcomes/deliverables**

- 4.1 To ensure that Forum have the assurance that challenge of budgets being set are taking place and an understanding of decisions that are being taken at Forum has been achieved.

#### **5. Financial implications (including value for money)**

- 5.1 The formal re-establishment of the SFWG will enable detailed budget discussions to be undertaken with members of Forum. This reduced group size will facilitate more robust discussions, ensuring the budgets set support value for money and support the objectives and values of the schools Forum
- 5.2 These discussions will ensure budget construction is developed in accordance with the latest Schools and Early Years Financial Regulations.

#### **6. Legal Implications**

- 6.1 This paper does not present any significant legal concerns.
- 6.2 The Schools Forum must continue to operate in accordance with the Schools Forum (England) Regulations 2012 and other relevant guidance; it is noted that the SFWG will explicitly not be a decision-making body.

Anthony Heath, Head of Legal Services - 16 September 2024.

#### **7. HR issues**

- 7.1 None.

#### **8. Equality impact assessment**

- 8.1 An EIA is not needed as the report does not contain new or changing policies or proposals.

#### **9. List of background papers other than published works or those disclosing confidential or exempt information**

- 9.1 None.

#### **10. Published documents referred to in compiling this report**

- 10.1 Schools Forum Paper 22/06/2017.

## APPENDIX A

### Terms of Reference

#### Schools Forum Working Group (SFWG)

- 1 The role of the SFWG** is to act as a consultative group on financial matters relating to schools and any wider education issues referred to it by the Schools Forum.

(Financial matters include, but are not limited to, areas such as the school funding formula, benchmarking analysis, review of use of reserves and any other financial issues that may require consultation with the group on behalf of Forum.)

- 2 Appointment of SFWG:**

- 2.1 The membership of SFWG will align to financial years and the budget cycle. The membership and Chair of the group will be agreed by Forum.
- 2.2 The membership of the group will need to cover as a minimum Early Years, Primary Maintained, Primary Academy, Secondary Academy and Post 16.
- 2.3 The Chair will be nominated by SFWG and will be a Schools Forum member, but not a local authority officer.

- 3 Meetings**

- 3.1 Finance and Senior Education officers will arrange, attend and set the agendas in consultation with the Chair of SFWG. There will be meetings where the finance officers request the attendance of other Local Authority officers and Head Teachers and Providers which are deemed appropriate to facilitate discussions.
- 3.2 The Lead Officer will circulate the agenda and supporting papers at least 5 working days before the meeting. The purpose and outcomes required from the meeting will be made clear on the agenda to enable the meeting to be as efficient and effective as possible.
- 3.3 Notes will be taken at the meeting as required by local authority officers.
- 3.4 Members are required to accommodate the meetings to ensure a balanced discussion is undertaken. Substitutes will be required, and meeting dates will be issued with at least 4 weeks' notice, however, there may be exceptional circumstances where this timeline is not achievable.

## APPENDIX B

Date	Who / what	Requirement
22 Oct 2024	Working Group	2025/26 AP Inclusion Model Proposal 2025/26 Proposed De-delegated Budget
12 Nov 2024	Working Group	2025/26 AP Inclusion Model Proposal 2024/25 Revenue Monitoring Report 2025/26 Proposed High Needs Block Budget 2025/26 Proposed Schools Block Budget submission 2025/26 Proposed Early Years Budget 2025/26 Proposed Central Schools Services Block Budget
19 Nov 2024	Deadline	School Forum Papers Due
10 Dec 2024 (date TBC)	Schools Forum	2024/25 Revenue Monitoring Report 2025/26 Proposed High Needs Block Budget 2025/26 Proposed Schools Block Budget submission 2025/26 Proposed Early Years Budget 2025/26 Proposed Central Schools Services Block Budget 2025/26 AP Inclusion Model Proposal 2025/26 Proposed De-delegated Budget
17 Dec 2024	Working Group	2025/26 AP Inclusion Model Proposal 2024/25 Revenue Monitoring Report
03 Jan 2025	Deadline	School Forum Papers Due
14 Jan 2025	Schools Forum	2024/25 Revenue Monitoring Report 2025/26 Final High Needs Block Budget 2025/26 Final Schools Block Budget 2025/26 Final Early Years Budget 2025/26 Final Central Schools Services Block Budget 2025/26 AP Inclusion Model