

SCHOOLS FORUM
VIRTUAL MEETING VIA MICROSOFT TEAMS
HELD ON 1 JULY 2025

PRESENT:

Primary Headteacher Representative: Mr E Squire and Mrs K Coe

Primary Academy Headteacher Representative: Mrs S Richardson (Chair)

Secondary School Headteacher Representative: Mr R Henderson and Mrs C Humble

Secondary School Headteacher Academy Representative: Mrs L Spellman

Special School Representative: Mrs C Thomas

LA Representative: Councillor C Clark

OFFICIALS: Mr A Bryson – Chief Accountant
Mr G Waller – Senior Accountant
Mr E Huntington – Assistant Director Education, Inclusion and Achievement
Mrs M McCarthy - Director of Children's Services
Mrs V Housley – Head of Service Education and Inclusion
Mr D Leane – Additional Posting
Mrs S Hewitson - Secretary to the Forum

OBSERVOR: Mrs Williams

It was noted that the meeting was not quorate.

1. **APOLOGIES FOR ABSENCE**

RESOLVED that the apologies for absence were received from Mr J Faulkner, Cllr L Evan and Mr R Parkinson be accepted by the Forum.

2. **DECLARATION OF INTERESTS**

Members were invited to declare any personal or business interests they may have in any item included on the agenda.

No interests were declared.

3. **MINUTES OF THE LAST MEETINGS – 21 JANUARY 2025**

RESOLVED that the minutes of the meetings held on 21 January 2025 be deferred to the next meeting.

4. **MATTERS ARISING**

There was no update.

Cllr. Clark joined the meeting at this juncture.

5. **FINAL DEDICATED SCHOOL GRANT AND SCHOOLS OUTTURN 2024-25**

A copy of the Schools Budget Outturn for 2024/25 and the Appendix for the Forum. The following salient points were highlighted to members of Schools Forum:

Clerk

Summary

This paper informed the Forum of the outturn position for the Dedicated Schools Grant (DSG) and provided an overview of the Maintained School Balances as at 31st March 2025.

As you will recall from previous reports, the 2024/25 High Needs (HN) budget was set anticipating a small in-year saving of £17k. However, continued pressure on the High Needs Block, partially offset by savings from other DSG Blocks, resulted in an overall in-year deficit of £2.9m. This has resulted in an increase in the LA's overall cumulative DSG deficit from £3.8m at the end of the 2023/24 financial year to £6.7m at the end of 2024/25.

As you will see from the variance analysis and explanations produced below, expenditure pressures associated directly with High Needs continued to rise during the year and totalled £3.7m (Appendix 1 lines 1.21. to 1.2.13). Within this, the largest individual areas of overspend were associated with Alternative Provision (£1m), Independent Special School placements (£988k), and increased exceptional payments and top-up levels to SBC Special Academies (£908k).

The medium term impacts of the outturn position will be factored into future High Needs medium term financial forecasts.

School Budget

Appendix 1 showed the revised budget against the actual outturn for 2024/25 on the Schools Budget, in the prescribed DfE Section 251 reporting format. Please note that these figures were all prior to any academy recoupment.

As noted in previous School Forum reports the authority had been working with the Government on the Delivering Better Value Programme. The authority had submitted a DSG Management Plan to DfE which outlined a number of mitigations aimed at clearing the current DSG deficit by the end of financial year 2027/28.

De-Delegated Items

It was previously clarified at Schools Forum that should there be an underspend on any of the de-delegated services then it would be a Schools Forum decision on how the outstanding funds would be spent. Therefore, it is recommended that the net saving of £14.7k, as described below, is utilised against the DSG deficit.

School Balances

Overall maintained school balances at 31/03/25 now stand at £3.16m. This was an increase of £0.28m between 2023/24 and 2024/25 and represented 7.65% of the 2024/25 budget.

There were 5 Maintained Primary and 0 Maintained Secondary schools holding excess surplus balances at 31/3/25 i.e. with balances above the 8% and 5% thresholds. This was a decrease of 2 in the Primary Sector and 0 in the Secondary sector compared to 2023/24, and of these schools, all have requested permission to utilise these balances. These have subsequently been approved by the Authority.

At 31st March 2025 there were no schools with a deficit balance. This was the same position at 31st March 2024.

L. Williams joined meeting at this juncture as an observer.

It was highlighted that it was difficult to know how get out of this deficit due to the level of high needs, the continued increase in children with high needs. The Government needed to look at this but in comparison to other authorities, Stockton's deficit was not high. Mrs Housley commented that the NEET figures were high. Mrs Richardson commented that

schools were looking at what Alternative Provision was available to children as it was extremely limited.

Mr Squire joined the meeting.

In response to a members question on school balances, there were 7 maintained schools last year and now there were only 5 with surplus balances.

Recommendations

1. The Schools Forum is asked to note the unused balance on the de-delegated items (as per paragraph 9 below) and to decide on how it wishes to utilise these funds.
2. The Schools Forum is asked to note the final position for 2024/25 and its impact on the Councils cumulative DSG deficit position.

With regards to the underspend on the de-delegated items Mrs Coe, Mr Henderson and Mr Squire agreed to offset the DSG deficit. Information to be emailed round from Mrs Coe to all maintained schools on behalf of Graham Waller regarding de-delegated funds.

G Waller and
K Coe

6. **HIGH NEEDS UPDATE REPORT**

A copy of the High Needs report was circulated in advance of the meeting for information. Mr Huntington guided members through the report:

Summary

The report provides an update to Schools Forum on the progress and formal conclusion of the Delivering Better Value (DBV) in SEND programme, as supported and overseen by the Department for Education (DfE).

Introduction

As members would be aware, the DBV programme aimed to support local authorities in improving the outcomes and experiences of children and young people with special educational needs and disabilities (SEND), while also ensuring the long-term financial sustainability of high needs funding, pending any decision from government on the statutory override, currently expended to be reviewed by March 2026.

Stockton-on-Tees was selected as one of 55 local authorities to participate in the DBV programme, which included detailed data analysis, stakeholder engagement, and the development of a tailored priority plan to address system-level inefficiencies and unmet needs.

The programme had now formally concluded, and this report summarises key achievements, outstanding actions, and the next steps for sustaining and embedding change across the SEND system.

Background and Objectives

The DBV programme was designed to:

- Help local areas identify and address cost pressures in high needs provision
- Support improvement in SEND arrangements through system wide collaboration
- Promote better outcomes for children and young people with SEND

through more effective and inclusive local services

- Ensure high needs funding is used efficiently and fairly

In April 2025, the DFE formally confirmed the closure of the DBV programme. Councils had been advised to transition their focus toward embedding the plans and actions developed during the programme, integrating these within their wider SEND and inclusion strategies. While the programme funding and external facilitation have now ceased, the expectation remains that the principles and tools of DBV will continue to guide local improvement work.

Current Position

They had continued to see an increased demand for SEND Services in the last academic year. Children with speech language and communication needs continued to be the highest level of needs and this was increasing from the Early Years, followed by children with social, emotional and mental health needs and there had been a 31% increase in requests for EHC Needs Assessment.

Most pupils with EHCP or SEND Support in Stockton were in mainstream primary and secondary schools, the proportion of which had increased since 2018, like the national and regional trend, however they continued to see those children who required specialist provision through in year transfers, transfer into high-cost independent school places, owing to availability of places.

The proportion of children with an EHCP in independent schools had risen substantially to 9.1% at the end of the last academic year, this was a similar to the Northeast, but higher than the national average (5.7% in 2023/24).

Oversight of DBV Projects

In January 2024, it was agreed that the proposed three pilot schemes outlined to the School's Forum previously in July 2023, be expanded to include wider service improvement plans. Therefore, a total of 9 projects were planned and undertaken. A summary of which is as follows:

Table of activities relating to DBV in Stockton on Tees was listed within the report.

Financial Position

The Dedicated Schools Grant cumulative deficit at 01/04/24 was £3.8m, having reduced from £6.05m in 2020/21. However, this reduction was enabled by the injection of significant amount additional High Needs funding from DfE via the DSG, in-year savings from other DSG blocks and transfers from the Schools Block supported by Schools Forum.

However, the continued growth in numbers of young people requiring support from High Needs and the increased cost of provision has resulted in an in-year overspend of £3.7m on the High Needs Block in 2024/25. This was partially offset by savings on other blocks which reduced the in-year overspend to £2.9m. However, this has now resulted in an increase in the Councils overall cumulative DSG deficit from £3.8m to £6.7m.

In 2024/25 the largest individual areas of overspend were associated with Alternative Provision (£1m), Independent Special School placements (£988k), and increased exceptional payments and top-up levels to SBC Special Academies (£908k).

The outturn position for 2024/25 is described in more detail in the separate agenda item Schools Budget & Balances Outturn 2024/25.

Next Steps

In response to increasing financial and operational pressures within the High Needs Block of the Dedicated Schools Grant, the Council was going to propose the formation of a dedicated High Needs Subgroup, which would be responsible for reporting into school's forum and had a focused oversight on the presenting issues, demand and spend.

Proposal to introduce a High Needs Subgroup to be discussed with Schools Forum in Autumn 2025.

Summary

Whilst the council remained in a deficit position in respect of the High Needs Block, the benefits of the projects have not yet been fully realised due to implementation timescales and a continued rise in demand, which had offset some planned reduction in spend.

It was anticipated that as all project mature and are fully embedded the financial impact will be evident. Ongoing monitoring and evaluation will be essential to track progress and inform future demand within the borough.

There were 100 new places anticipated from January 2026. C Tiffany had been seconded to help with Alternative Provision (AP) for two years. A high needs banding review to be completed, post 16 offer to be enhanced and support internships and graduation ceremonies attended and celebrating their successes.

In response to a members question, Mr Huntington would gather the data regarding the EHCP timeline for schools to see when they were being approached at which point.

In response to a members question, Mr Huntington clarified that they were looking at negative impacts of AP's as well as ensuring children were reintegrating back into school. It was agreed that Mr Squires, Mrs Coe, Mrs Richardson and Mr Downs to be part of sub committee group.

Members noted the High Needs update.

7. MEETING DATES AND PROGRAMME OF WORK FOR THE YEAR AHEAD

RESOLVED that the Calendar of the meeting dates for 2025-26 be approved by members of Schools Forum.

8. ANY OTHER BUSINESS

8.1 Vacancies

There were multiple Primary Academy and Primary Headteacher vacancies and one Primary School Governor vacancy to fill. This would be raised at the next Primary Headteacher meeting.

9. DATE AND TIME OF NEXT MEETING

RESOLVED that the next meeting of Schools Forum is due to be held on 14 October 2025 at 1.00 p.m.