SCHOOLS FORUM
Agenda

Date Wednesday 25 June 2025

Time 4.00 pm

Venue

Notes 1. DECLARATIONS OF INTEREST- If a Member requires any advice on any item involving a possible declaration of interest which could affect his/her ability to speak and/or vote he/she is advised to contact Paul Entwistle or in advance of the meeting.

2. CONTACT OFFICER for this Agenda is Tel. 0161 770 5151 or email

Item No

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Oldham Council

Agenda

SCHOOLS FORUM

Wednesday 25th June 2025 4.00pm
Teams Meeting

		Approx duration	Officer	Papers
1	**Welcome and Apologies**		Chair	
	Apologies/Declarations of Interest			-
2	**Minutes and Matters Arising**	5 mins	Chair	Attached
	Minutes of meeting held on 26th March 2025			
3	**DSG Funding Update**	20 mins	Andy Cooper	Attached
4	**School Balances**	20 mins	Andy Cooper	Attached
5	**Proposed Dates for future meetings for 2025/26:** Weds 22nd October 2025 Weds 14th January 2026 Weds 25th March 2026 Weds 01st July 2026	5 mins	Chair	
	Any other business – Must be notified to vicky.gibbons@oldham.gov.uk **24 hours before the meeting**			

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To Members of the Schools Forum

Finance Directorate
Schools Finance Team
Oldham Council Offices
Spindles Shopping Centre
George Street
Oldham
OL1 1HD

Tel: 0161 770 4925

Dear Colleague,

Re: SCHOOLS FORUM 25TH JUNE 2025

Please find attached the agenda and papers for the next meeting of the Schools Forum to be held at **4.00pm** on Wednesday 25th June 2025 via Microsoft Teams.

If you are unable to attend this meeting, please email your apologies to schoolsteam.finance@oldham.gov.uk.

Yours sincerely

Andy Cooper

Senior Finance Manager

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Oldham Council

Spring Term 2025

Minutes

Meeting of the Oldham Schools Forum

Wednesday 26 March 2025
via Microsoft Teams
at 4.00pm

PRESENT:		
Stewart Ash	Pinnacle Trust (CFO)	Primary Academy Representative
Joe Brownridge	E-ACT (CFO)	Secondary Academy Representative
Tracey Cavanagh	Holy Rosary RC Primary School (Headteacher)	Primary Maintained Representative
Kate Anais Hoggard	Channings	Early Years Representative- PVI
Paul McGrath	St Thomas CE Primary School, Werneth	Primary Academy Representative
Garry Needle	St Jospeh's	Primary Maintained Representative
Liz Travis (Chair)	Holy Trinity CE Primary School (Headteacher)	Primary Maintained Representative
N Woodworth- attending for Claire John	Newbridge Group	Special Sector Representative

IN ATTENDANCE:	
Nicola Barrett	Clerk
Matthew Bulmer	Director of Education, Oldham Council
Amber Burton	Assistant Director SEND and Inclusion, Oldham Council
Andy Cooper	Senior Finance Manager, Oldham Council
Victoria Hayes	Senior Accountant, Oldham Council
Clare Roper	Senior Accountant, Oldham Council
Tony Shepherd	Assistant Director of Education, Oldham Council
Jennifer Wright	Early Years Funding and Sufficiency Manager

ABSENT:		
Leon Ashton	Crompton House School (Governor)	Secondary Academy Representative

Sharon Costello	Harmony Trust (CFO)	Primary Academy Representative
Rob Higgins	Blue Coat School, The Cranmer Trust (Headteacher)	Secondary Academy Representative
Clare John	New Bridge Trust (CEO)	Special School Representative
Anthony Leighton	The Cranmer Trust (CFO)	Secondary Academy Representative
Karl Newell	Crompton House School, New Bridge Academy (Headteacher)	Secondary Academy Representative
Emmett Patel	Kingsland School (PRU) (Headteacher)	Special School Representative
Jeremy Sutcliffe	Kingfisher Special School (Governor)	Special School Representative
Iain Windeatt		Trade Union Representative

Prior to the start of the meeting, the Clerk confirmed the meeting was quorate (40% of members in post).

1. WELCOME AND APOLOGIES

1.1 Welcome

The Chair welcomed everyone present and opened the meeting at 4.04pm.

1.2 Apologies for Absence

There were no apologies for absence.

1.3 Business, Pecuniary and Personal Interests

No declarations of interests were shared.

2. MINUTES OF THE PREVIOUS MEETING AND MATTERS ARISING

2.1 Minutes of the Previous Meeting

RESOLVED: that the minutes of the meeting held on 15 January 2025 be approved as a correct record and signed by the Chair, subject to the following amendment:.

- Minute 4.3 (Dedicated Schools Grant (DSG) Update)

The Forum had approved the de-delegation of funding areas however it had been deferred to secondary heads for final approval. There was a brief discussion and the Director of Education advised that because secondary schools no longer de-delegate, the approval to de-delegate is not necessary. The Chair was in agreement that the deferral for approval was not needed in this sense.

The wording ‘However in the absence of representation from the Sector at the meeting this will (as in 23/24) be deferred to the Secondary Heads for final approval’ be removed from the minutes.

ACTION: Chair

2.2 Matters Arising from the Previous Minutes

There were no matters arising from the minutes of the previous meeting that were not covered elsewhere on the agenda.

3. DEDICATED SCHOOLS GRANT (DSG) UPDATE

3.1 The Dedicated Schools Grant 2024-2025 and 2025-2026 joint report, from the Director of Finance and the Director of Education, Early Years and Skills, had been shared in advance of the meeting.

3.2 The Senior Finance Manager highlighted Table 1 - DSG Management Plan 2023-2024 to 2025-2026.

The Senior Finance Manager advised that the local authority's Financial Statements for 2023-2024 were approved by the Audit Committee on 26 February 2025. The outturn was confirmed as a net surplus of £3.702m across the four blocks of the DSG.

The Senior Finance Manager explained that whilst there are a number of days left in the financial year and the figures could change, no significant change would be anticipated. An in-year deficit of £4.911m is forecast for 2024-2025 resulting in a projected outturn deficit of £1.209m. There has been a £1.429m underspend in growth funding within the schools block, which reverses the deficit, producing an estimated surplus of £0.220m for 2024-2025. This surplus is £0.793m better than the surplus reported in the previous meeting, which was £0.573m.

The Senior Finance Manager advised that the forecast deficit for 2025-2026 is £5.967m and assuming the growth funding brought forward from 2024-2025 is fully spent, the year-end deficit would be £5.747m. This is £2.400m worse than the £3,347m deficit reported in the previous meeting.

3.3 The Senior Finance Manager highlighted Table 2 – DSG Management Plan Variances which highlights movement in income and expenditure. In 2024/25 the main increase in expenditure was in relation to the High Needs block; an increase of £0.743m compared to the position reported to the January meeting. The previously forecast pressure of £0.220m in the early years provision is now expected to be £0.063million

In terms of 2025-2026, the Schools Block funding has increased by £0.879million and there is continued pressure on the high needs block. The cost of out of borough provision was highlighted.

3.4 Growth Funding

The Senior Finance Manager advised that there was a carry-forward agreement in principle at the last meeting and the carry-forward is confirmed to be £1.429million.

There is concern about the increase in expenditure within the high needs block and it is recognised that Oldham is not the only authority to be experiencing the increase. There was discussion regarding the position in other Greater Manchester authorities and it was recognised that whilst Oldham's position is not ideal, it is better than some authority positions.

Q. Is there is a wider view that the statutory override on the local authorities will be extended.
The forum heard that anecdotally this has been heard among finance colleagues; there has not been any formal confirmation. The view among finance professionals is that it is likely to be extended.

It was noted that the local authority approach is that it is better to hold a deficit within high needs than it would be not to pay for the support for children with SEND. The forum heard that politicians support the approach. It is recognised that it is a risk for the authority but leaders feel it is important to maintain SEND support.

Q. Can the local authority continue like this?
Not indefinitely, but the authority is not unique in this regard. Mr Bulmer advised that this means that leaders do not spend with reckless abandonment. Mr Bulmer advised that the finance team at the authority was asked to reforecast the deficit on the high needs block and it is not a worse-case scenario; leaders believe it is a realistic position. The forum heard that it is felt that the forecast at the end of next year is proportionate and the risk can be managed, and the forum will continue to be advised throughout the next year.

Q. Is the cost of out-of-borough care increasing because of the rise in need and lack of places in the authority?
No, it is mostly around the increased cost of the independent providers. There was a discussion around these costs, with a recent report from the government recognising that it is an unfettered industry. There is nothing leaders can do in regard to the increasing costs in some circumstances when there are not alternative options.

RESOLVED: i) that the Forum noted the current forecast position in relation to the DSG; and

ii) that the Forum noted that the previously approved in principle 2024-2025 Schools Block Growth Funding, to be carried forward and deployed in 2025-2026, is now confirmed as £1,429million.

4. EARLY YEARS FUNDING CONSULTATION: OUTCOME

Jennifer Wright updated the forum regarding the consultation outcome.

A consultation outcome report had been shared in advance of the meeting. It was noted that 27% of eligible providers responded to the survey and the preferred options were explained.

Following the consultation, the early years funding rates for 2025-2026 have been approved. The table depicting the funding rates was reviewed and it was noted that the SENIF will be consulted upon separately and the total to be allocated for 2025-2026 will be £188,569.

RESOLVED: that the Forum noted the outcome of the Provider Early Years Funding consultation 2025-2026 as summarised.

5. DATES AND TIMES OF FUTURE MEETINGS

RESOLVED:
- Wednesday 11 June 2025 at 4.00pm- rearranged to 25 June 2025
- TBC November 2025 at 4.00pm
- TBC March 2026 at 4.00pm

6. ANY OTHER BUSINESS

There were no urgent items to consider.

The Chair thanked the Senior Finance Manager for preparing all the papers for the meeting.

(There being no further business, attendees were thanked for their attendance and the meeting was declared closed at 4.20pm).

SIGNED as approved: _____ (Chair)

DATE: _____

Finance Directorate
Schools Finance Team
Oldham Council Offices
Spindles Shopping Centre
George Street
Oldham
OL1 1HD

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Joint Report:
Director of Finance
Director of Education, Early Years and Skills

Item 3 – Dedicated Schools Grant Final Outturn 2024/25 and Budget Update for 2025/26

Schools Forum – 25th June 2025

1. Purpose of the Report

1.1 This report provides an update on the following:

- The provisional 2024/25 outturn for the Dedicated Schools Grant
- An update to the Dedicated Schools Grant budget for 2025/26

2. Outturn 2024/25 updated Forecast 2025/26

2.1 Table 1 below details the 2024/25 outturn, an updated forecast for 2025/26 and a summary of the movements compared to the position reported to the last meeting in March 2025.

Table 1 – DSG Update 2024/25 to 2025/26

DSG Summary 2024/25 to 2025/26	2024/25 Outturn £000	2025/26 Forecast £000
Schools Block (excludes central services)	255,312	274,777
Central Schools Services Block	2,378	2,559
Early Years Block	17,480	18,535
High Needs Block – pre/post 16	61,719	66,954
Under Two & Two Year Olds' Funding	13,281	20,564
Early Years Pupil Premium	573	648
Early Years Disability Access Fund	216	218
Total Grant	**350,959**	**384,255**
Budget Requirement		
Individual Schools Budgets	255,928	276,157
Early Year Funding Delegated to Schools	7,757	8,189
High Needs Funding for Schools (including Post 16)	51,747	57,310
Total Delegated to Schools	**315,432**	**341,656**
Central Schools Services	2,398	2,559
Central Early Years Services	1,043	1,692
Central High Needs Services	13,558	16,576
Three and Four Year old PVI's	9,001	9,542
Under two & Two Year Old Funding	12,783	19,853
Total Retained Centrally	**38,783**	**50,222**
Early Years Pupil Premium	618	603
Early Years Disability Access Fund	26	408
Budget Requirement	**354,859**	**392,889**
(Deficit)/Surplus	**-3,900**	**-8,634**
Balance brought Forward	3,702	1,182
Provisional (Deficit)/Surplus	**-198**	**-7,452**
Anticipated Growth underspend committed for 25/26	1,380	
Balance Carried Forward	**1,182**	**-7,452**
Reported to Schools Forum at March 25	220	-5,747

2.2 The actual in-year deficit for 2024/25 was £3.900m, which when added to the surplus of £3.702m brought forward from 2023/24 and with a positive adjustment of £1.380m for Growth underspend committed in the following year produces a cumulative (provisional) surplus of £1.182m as at 31 March 2025, this position is subject to external audit and Department for Education approval.

2.3 This represents a favourable movement of £0.962m compared to the projected outturn surplus of £0.220m that was reported to the March 2025 Schools Forum meeting. Table 2 below provides further detail in relation to the movements in both years when compared to the position reported to the last meeting in March 2025. Favourable movements within Early Years (£0.384m) and within the High Needs Block (£0.626m) are offset by a reduction in the Growth funding carried forward into 2024/25 (£0.048m).

Table 2- Analysis of Movements since March 25 Schools Forum

DSG Management Plan- Variances	2024/25	2025/26
	£000	£000
Balance brought forward	3,702	220
Change in surplus / (deficit) from previous year	-3,482	-5,967
As reported in March 2025	**220**	**-5,747**
Additional funding:		
Schools Block		
Central School Services Block (CSSB)		136
Early Years Block	1,411	123
High Needs Block		-253
Movement in Funding	**1,411**	**6**
Additional adjustment to budget requirement :		
Schools Block-Adjust Growth Underspend carried forward	-48	48
Early Years (offset by additional income & balance brought forward	-1,027	-445
High Needs Block- Special schools	-203	-1,807
High Needs Block- Resourced	-60	-212
High Needs Block- Post 16		-64
High Needs Block- Central	889	-57
CSSB – offset by additional income		-136
Movement in Expenditure	**-449**	**-2,673**
Movement in Opening Balance		**962**
Movement compared to previous position	**962**	**-2,667**
Revised Surplus	**1,182**	**-7,452**

2.4 The March 2025 Schools Forum was advised that there would be an estimated in-year deficit for 2024/25 of £5.967m and that this in turn would produce a closing cumulative deficit of £5.747m when added to the forecast surplus brought forward of £0.220m.

2.5 Based on revised funding allocations (net increase of £0.006m) and updated expenditure projections (additional £2.673m), the forecast in-year deficit has increased by £2.667m from £5.967m to £8.634m for 2025/26. The cumulative surplus at the end of 2024/25 of £1.182m is however £0.962m higher than the previously reported position, resulting in a net increases in the pressure of £2.667m and a revised cumulative deficit of £7.452m.

2.6 Table 3 summarises the movement by the 4 funding blocks that comprise the DSG. It shows the in-year surplus or deficit for each of the four blocks for 2024/25 and 2025/26 and the total cumulative impact on the DSG, arriving at a forecast deficit of £7.452m at the end of 2025/26.

2.7 There is an increased pressure of £2.150m within the High Needs Block increasing to £2.403m with an anticipated downward adjustment to funding of funding of £0.253m anticipated in July. There are increases in pressures relating to Resourced Provision (£0.212m), Post 16 (£0.064m) and £0.057m. The largest single contributor is an increase

of £1.817m in the cost of Special Schools. An increase of £0.136m of funding in relation to the Central Services Block is matched with anticipated expenditure. Likewise, an increase in Early Years funding of £0.123m is offset by an increase in planned expenditure of £0.445m, the net expenditure of £0.220m is offsetting the balance brought forward from 2024/25. Finally, the Schools Block Growth Funding being carried forward from 2024/25 has reduced by £0.048m from £1.429m to £1.380m and is fully committed in 2025/26.

Table 3 - DSG Summary by Funding Block

	BLOCKS				
	Early Years £000	Schools £000	High Needs £000	CSSB £000	Total £000
Balance brought forward from 2023/24		**616**	**3,086**		**3,702**
2024/25					
Income	31,550	255,312	61,719	2,378	**350,959**
Expenditure	31,228	254,548	65,305	2,398	**353,479**
In Year Balance (-) is deficit	**322**	**764**	**(3,586)**	**(20)**	**(2,520)**
Balance Carried forward to 2025/26	**322**	**1,380**	**(500)**	**(20)**	**1,182**
2025/26					
Income	39,964	274,777	66,954	2,559	**384,254**
Expenditure	40,286	276,157	73,886	2,559	**392,888**
In Year Balance (-) is deficit	**(322)**	**(1,380)**	**(6,932)**	**0**	**(8,634)**
Balance Carried forward to 2026/27	**0**	**0**	**(7,432)**	**(20)**	**(7,452)**

2.8 It is an important element of the financial management of the Authority that the DSG, wherever possible is not in a deficit position, notwithstanding which, clearly the financial position of the DSG has worsened. A surplus of £1.182m is being reported for 2024/25 this is due to an underspend in relation to growth funding within the schools block and also within Early Years, both of which are committed in 2025/26 and without which there would have been a closing deficit of £0.520m. The forecast deficit at the end of 2025/26 has increased, by £2.667m to £7.452m.

2.9 The increase is driven by pressures within the High Needs Block where both demand for and the cost of services continue to grow exponentially year on year, both locally and nationally. Therefore, it is vitally important that the level of scrutiny and management intervention that previously returned the DSG to a surplus position is upheld to ensure that the use of funding is optimised and future deficits are mitigated wherever possible. Implementation of the programme of work funded under the Delivering Better Value in SEND combined with the complimentary work undertaken in the North West Change Partnership Programme (NWCPP) and the Early Language Support for Every Child initiative (ELSEC) will be pivotal in the consolidation and future sustainability of the of the DSG in Oldham and work will continue throughout 2025/26 and beyond to ensure that the current position is mitigated as far as is possible going forward.

3. Actions/ Recommendations

3.1 Schools Forum is requested to note:

1) The draft 2024/25 outturn for the Dedicated Schools Grant
2) The current DSG budget for 2025/26 and the consolidated forecast position as at 31 March 2026

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Report of the Director of Finance

Item 4. School Balances 2024/25

Schools Forum – 25 June 2025

1. Purpose of the Paper

1.1 The purpose of the paper is to update members on the level of actual school balances for 2024/25 for maintained schools.

2. Background

2.1 All schools receive their delegated budget share based upon the Local Funding Formula.

2.2 All schools via their governing body have delegated powers and responsibilities to manage and deploy their financial resources in accordance with their agreed aims and objectives to achieve the best outcomes for pupils.

2.3 Maintained schools are permitted to carry forward any year end surplus/deficit recorded at the 31 March into the following financial year on the condition that they conform to the rules of the Balance Control Mechanism Scheme.

2.4 The Balance Control Mechanism Scheme is included in Oldham's Scheme for Financing Schools.

3. Oldham Final Position 2024/25

3.1 The tables below summarise school balances for the Financial Year 2024/25 by sector and the change in position from 2023/24. A total of 50 schools' balances are included in the table below.

Table 1 School Balances 2024/25

Sector	2023/24	2024/25	Movement	Percentage movement from 2023/24
Primary	£4,942,489	£3,901,815	(£1,040,674)	(21%)
Secondary	£3,256,493	£2,984,462	(£272,031)	(8%)
Special	£379,214	£273,797	(£105,417)	(28%)
Total Schools	**£8,578,196**	**£7,160,074**	(£1,418,122)	(17%)
Asset Purchase Scheme	£2	£2	£0	0%
Total	**£8,578,198**	**£7,160,076**	(£1,418,122)	(17%)

3.2 The table above identifies that school balances decreased overall by £1.418m or 17% compared to 2023/24. This excludes the Asset Purchase Scheme which represents funds currently loaned to schools.

3.3 School balances showed an in-year surplus of £7.160m at the end 2024/25 which includes a very small amount for the asset purchase scheme.

3.4 Seven schools had deficit balances at the end of 2024/25 totalling £0.386m.

3.5 "S*urplus*" school balances are defined as balances which are greater than 12% of the current year's original school budget share for all schools (excluding pupil premium).

3.6 The table below summarises **surplus** school balances above the limits and the number of schools for 2024/25 by sector together with the change from 2023/24. Across all sectors, balances have decreased by 76%.

Table 2 Surplus School Balances 2024/25

Sector	2023/24 Surplus Balances	2023/24 No of schools	2024/25 Surplus Balances	2024/25 No of schools	Movement	Movement No of Schools
Primary	£627,683	7	£435,180	7	(£192,503)	0
Secondary	£1,098,292	1	0	0	(£1,098,292)	(1)
Special	£108,184	1	0	0	(£108,184)	(1)
Total	**£1,834,159**	**9**	**£435,180**	**7**	**£1,398,979**	**(2)**

3.8 The total surplus balances were £0.435m. Of the 7 schools with surplus balances, 2 have submitted an official plan to the LA to carry the balances forward. The deadline for submittal

of Utilisation of Balances to the LA is 30th June so at the time of writing the report, we await submissions from the remaining 5 schools.

3.9 The decision regarding whether there will be any removal of surplus balances from schools will be reviewed once we have confirmation of whether acceptable plans have been submitted from each school to carry them forward.

4. Conclusion

4.1 Members of Schools Forum are asked to note the contents of this report a further update will be given at the next Schools Forum meeting.

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