

SCHOOLS FORUM AGENDA ITEM

For Action

For Information

Brief Description of Item

This report provides a short update and a reminder regarding the Authority's High Needs Block Financial Forecast and the development of a mitigation plan.

Date (s) of any Previous Discussion at the Forum

The latest version of the DSG Management Plan was presented to the Schools Forum on 11 January 2023.

Background / Context

The Local Authority presented the latest version of the Authority's DSG Management Plan to the Schools Forum on 11 January 2023 (Document PP). Within this plan, the Authority stated that our forecast currently identifies that there is clear risk of a cumulative deficit building within our High Needs Block by the end of the 2025/26 financial year, as a result of recurrent structural in-year over spending, and that the risk of cumulative deficit by the end of the 2026/27 financial year is then high. We stated that our forecast identifies that mitigating action will need to be taken in order to prevent the accrual of a cumulative deficit balance within our High Needs Block, and that this will be a piece of work for the Authority to discuss within the Schools Forum during 2023. We indicated that mitigating action will need to be considered within the 2024/25 DSG and formula funding decision making cycle.

The Forum resolved on 11 January, that the Local Authority presents to, and discusses with, the Forum its 'mitigation plan', which is to be developed.

Document PZ now provides an update, and a reminder, and presents the beginnings of the considerations behind the development of 'mitigating' actions, for the Forum's awareness and review.

Details of the Item for Consideration

Please see Appendix 1.

Implications for the Dedicated Schools Grant (DSG) (if any)

As discussed in Appendix 1.

Recommendations

- (1) The Schools Forum is asked to consider and to note the information provided.
- (2) The Schools Forum is asked for its view on if (and how) it wishes to contribute more specifically to the development of a mitigation plan.

List of Supporting Appendices / Papers

Appendix 1 – Update and Reminder on the High Needs Block and the development of a mitigation plan.

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