

Total Membership 25
The Forum is quorate if at least 40% (10) of the members are present



London Borough of Waltham Forest
SCHOOLS FORUM

| Day/Date/Time | Venue |
|---|--|
| Wednesday 16 November 2022, 5.30 pm | VIA TEAMS |
| Contact: | |
| Clerk to Schools Forum | Dennese.white@walthamforest.gov.uk |
| Maintained Primary Headteacher Representatives (5) | |
| Claire Nairn | Handsworth |
| Lindsey Lampard | Chingford C of E Primary |
| Rosie McGlynn | Our Lady and St George |
| Tracey Griffiths | Barn Croft Primary School |
| Zakia Khatun | Whitehall Primary School |
| Primary Academies and Primary Free Schools Representatives (4) | |
| Laura Hewer | Lime Trust (Larkwood, Hornbeam) |
| Anne Powell | Griffin Trust (Riverley, Willow Brook, Lammas) |
| Maureen Okoye (Chair) | Arbor Trust (Davies Lane, Selwyn, Woodford Green, Acacia Nursery) |
| Iram Malik | Genesis Trust (St Marys and St Saviours) |
| Maintained Primary Governor Representatives (1) | |
| Aktar Beg | Edinburgh Primary |
| Nursery School Representative (1) | |
| Helen Currie | Forest Alliance Nursery Schools (Church Hill, Low Hall) |
| Maintained Secondary Headteacher Representatives (2) | |
| Clive Rosewell | Willowfield School |
| Jenny Smith | Frederick Bremer School |
| Secondary Academies and Secondary Free Schools Representatives (4) | |
| Wayne Barnet | Chingford Trust (North Chingford and South Chingford) |
| John Hernandez (Vice Chair) | Exceptional Education Trust (Norlington School and Sixth Form) |
| Rob Pittard | Exceptional Education Trust (Norlington School and Sixth Form) |
| Tracey Penfold | Highams Park Trust |
| Maintained Secondary Governor Representative (1) | |
| VACANT | VACANT |
| Maintained Special School Representative (1) | |
| Bruce Roberts | Belmont Park School |
| Special School and Special Academies Representative (1) | |
| Kirstie Fulthorpe | Whitefield Trust (Joseph Clark, Whitefield) |
| PRU (1) | |
| Liz Rattue | Hawkswood Group |
| Non School Members (4) | |
| Early Years Providers | VACANT |
| 16-19 Providers | Janet Gardner (Waltham Forest College) |

Total Membership 25

The Forum is quorate if at least 40% (10) of the members are present

| | |
|--------------|----------------------------|
| Trade Unions | Paul Phillips (NEU) |
| Diocesan | Carolyn Laws (Holy Family) |

AGENDA

| Agenda Item | Report Name | Report Authors |
|-------------|---|--------------------------------------|
| 1 | Welcome all and Apologies | Chair |
| 2 | Declarations of Interest | All |
| 3 | Minutes of meeting 21 September 2022 | Chair |
| 3a | Decision Sheet from 21 September 2022 | For the record |
| 4 | Local Funding Formula 2023-24 | Duncan James-Pike |
| 5 | Early Years Block: Early Years funding formula planning for free early education payments for 2, 3 and 4 year-olds for 2023-24 | Eve McLoughlin |
| 6 | Maintained Nursery Schools Business Rates | Eve McLoughlin |
| 7 | High Needs – Mid Year Update | Duncan James-Pike and Lauren Ovenden |
| 8 | High Needs – Capital Investment | Lindsay Jackson |
| 9 | High Needs – Inclusion Task & Finish Group | Duncan James-Pike |
| 10 | High Needs – Consultation on Inter Block Transfer | Duncan James-Pike and Eve McLoughlin |
| | Date of Next Meetings: Wednesdays, 5:30pm <ul style="list-style-type: none"> • 14 December 2022 • 18 January 2023 • 08 February 2023 | |

MINUTES OF SCHOOLS FORUM MEETING

Wednesday 21 September 2022

| Day/Date/Time | Venue |
|---|--|
| Wednesday 21 September 2022, 5.30 pm | VIA TEAMS |
| Contact: | |
| Clerk to Schools Forum | Dennese.white@walthamforest.gov.uk |
| Maintained Primary Headteacher Representatives (5) | |
| Claire Nairn | Handsworth |
| Lindsey Lampard | Chingford C of E Primary |
| Rosie McGlynn | Our Lady and St George |
| Tracey Griffiths | Barn Croft Primary School |
| Zakia Khatun | Whitehall Primary School |
| Primary Academies and Primary Free Schools Representatives (4) | |
| Laura Hewer | Lime Trust (Larkwood, Hornbeam) |
| Maintained Primary Governor Representatives (1) | |
| Nursery School Representative (1) | |
| Maintained Secondary Headteacher Representatives (2) | |
| Clive Rosewell | Willowfield School |
| Jenny Smith | Frederick Bremer School |
| Secondary Academies and Secondary Free Schools Representatives (4) | |
| John Hernandez (Vice Chair) | Exceptional Education Trust (Norlington School and Sixth Form) |
| Tracey Penfold | Highams Park Trust |
| Maintained Secondary Governor Representative (1) | |
| Maintained Special School Representative (1) | |
| Bruce Roberts | Belmont Park School |
| Special School and Special Academies Representative (1) | |
| Kirstie Fulthorpe | Whitefield Trust (Joseph Clark, Whitefield) |
| PRU (1) | |
| Non School Members (4) | |
| Diocesan | Carolyn Laws (Holy Family) |
| Officers | |
| Lauren Ovenden | Director of Education |
| Dennese White | Principal Accountant Education Finance |
| Duncan James-Pike | Strategic Finance Advisor, Children and Young People Services |
| Jamel Mason | Senior Finance Officer |
| Lindsay Jackson | Head of Education Business Effectiveness |
| Lucinda Lord | Senior Accountant Education Finance |
| Gurpreet Kataora | Head of School of Business |

| | |
|-----------------------|---|
| Sergio Dimech | Head of Education Finance |
| Observers | |
| Jasjeet Ali | Southgrove School |
| SB | |
| Shermaine Lewis | Frederick Bremer School |
| Mary Wilson | Handsworth School |
| Karina Thompson | Green Leaf School |
| Rosette Dixon | Leytonstone School |
| Yvonne Allijohn | Chingford Academies |
| Annette House | Edinburgh School |
| Sian Boutalbi | Gwyn Jones School |
| Apologies | |
| Elizabeth Rattue | Hawkswood School |
| Rob Pittard | Exceptional Education Trust (Norlington) |
| Maureen Okoye (Chair) | Arbor Trust (Davies Lane, Selwyn, Woodford Green, Acacia Nursery) |
| Wayne Barnett | Chingford Trust (North and South Chingford) |
| Aktar Beg | Edinburgh School |

1. Welcome and Apologies

- 1.1 Welcome new members: Laura Hewer, Carolyn Laws, Wayne Barnett
- 1.2 Apologies from Maureen Okoye, Elizabeth Rattue, Rob Pittard, Wayne Barnett and Aktar Beg
- 1.3 Thanks to Andy Stone and Amanda Daoud for their contributions.
- 1.4 Vacancy: Early years PVI Representative

2. Declaration of Interests

- 2.1 No Declaration of Interests highlighted

3. Minutes of September 2022 Schools Forum meeting

- 3.1 No inaccuracies documented. Minutes were agreed

3a. Decision Sheet from September 2022

Noted for record

4. Schools Forum Membership and Powers

- 4.1 This report reviews the representation of maintained schools and academies / free schools at Schools Forum following the October 2021 census.
- 4.2 Schools Forum to agree: That the current balance of school

Representation is appropriate to continue for the 2022-23 session.
All members agreed.

4.3 Question

We have 2 maintained representatives for secondary schools, should it not be 3?

Answer

One is a Governor.

5. DSG Outturn 2021-22

5.1 This report updates School Forum on the 2021-22 final outturn for the Dedicated School Grant; the balances held for each block at the end of March 2022; and the forecast balances for March 2023.

5.2 Question

Are we tapping into DSG Reserves?

Response

Yes

5.3 Are we overspending DSG?

Response

We are not overspending DSG but manage to stay within in year budget allocation. Deficit held within HN block is increasing as compensating reserves in Early years and Growth Fund are reducing. Net Deficit across all of DSG is £2.5m. £5m of HNS deficit is offset by Early Years and School Block reserves.

5.4 Do we need to think about DSG deficit in terms of decisions going forward?

Response

Yes, at some point in the future we are expected to address the historic deficit

6. Dedicated Schools Grant 2022-23 & update on School Funding Announcement for 2023-24.

6.1 This report updates School Forum on the Dedicated Schools Grant (DSG) ESFA allocations for 2022-23 and the July 2022 announcement by the Department for Education (DfE) on the provisional allocations for Schools, High Needs and Central Services blocks for 2023-24

6.2 **Comments**

HNB increasing year on year. New funding band increased but old band rates remain the same.

Response

New band rates are indexed. Old rates are not indexed. Special school are protected by way of MFG

Based on Place led funding and top up. Special schools received additional funding of 2% in 2022-23

And for 23-24 has a 3% MFG.

6.3 **Question**

LA spending about £4m on Out borough placements. Are we exploring any efficiencies within this sector?

Response

Will provide a report next School Forum.

7. **Issues arising from NFF consultation results for impact for 2024-25**

7.1 This report sets out some key concerns with the recent consultation on the national funding formula for 2024-25.

7.2 If appeal for Holy Family is not successful is there any other way, we can support the school?

Response

Yes, we will look at other alternatives

7.3 What is the appeal response time?

Response

No time frame but expected by September 2023

8. AOB

8.1 Question

How is the Supplementary Grant allocated next year?

Response

The supplementary grant is going to be rolled into the HN block for 2023-24. It is a cash amount allocated into 2023-24 HNB and then we get a 5% on top of the global figure.

Next meeting

Wednesday 19 October 2022 @ 17:30 Via Microsoft Teams Link

Schools Forum, 21 September 2022

Summary of Decisions

Item 4 Schools Forum Membership and Powers

Schools Forum Agreed:

2.1.1 The contents of this report.

Item 5 DSG Outturn 2021-22

Schools Forum noted:

2.1.1 The contents of this report.

Item 6 Dedicated Schools Grant 2022-23 & update on School Funding Announcement for 2023-24

Schools Forum noted:

2.1.1 The contents of this report.

Item 7 National Funding Formula Consultation 2024-25

Schools Forum noted:

2.1.1 The contents of this report.

| | | | |
|-------------------------------------|---|-------------|----------|
| Meeting / Date | SCHOOLS FORUM 16 November 2022 | Agenda Item | 4 |
| Report Title | Draft Local Funding Formula 2023-24 | | |
| Decision/Discussion/ Information | For Discussion and Decision by all | | |
| Report Author/ Contact details | Duncan James-Pike, Strategic Finance Advisor duncan.james-pike@walthamforest.gov.uk | | |
| Appendices | Appendix A: Draft Local Funding Formula for 2023-24 Appendix B: Formula Comparison with 2022-23 Appendix C: <u>Indicative</u> Base Line budgets 2023-24 | | |

1. SUMMARY

1.1 This report sets out the draft Local Funding Formula (LFF) and Minimum Funding Guarantee (MFG) for the Schools Block 2023-24.

2. RECOMMENDATIONS

2.1 Schools Forum to agree:

2.1.1 To use the NFF factors and rates for 2023-24.

2.1.2 To use the maximum MFG permitted (+0.5%).

2.1.3 After running the formula, if there are unallocated funds, these are allocated through raising the rates for Basic Entitlement (AWPU), subject to the maximum permitted.

2.1.4 If these upper limits are reached, any further funds will be applied to the Growth Fund.

3. REASON

3.1 Schools Forum must be consulted on any changes to the LFF or MFG although no change in approach is proposed for 2023-24.

4. BACKGROUND

4.1 In September 2015 Schools Forum adopted the following principles to be applied to its funding decisions:

- Transparency
- Fairness

- Stability
 - Support for vulnerable students
- 4.2 In October 2019 Schools Forum noted the direction of travel towards a NFF and asked officers to model the impact of moving towards NFF funding figures over a transitional period.
- 4.3 A task and finish group considered several detailed models and recommended the adoption of the NFF factors and rates in 2020-21, coupled with raising the MFG to the new upper limit of +1.84%. The high MFG protected schools from the negative effect of any redistribution flowing from the adoption of NFF factor rates, while allowing some gains to feed through.
- 4.4 These proposals were adopted by Schools Forum in November 2019 and confirmed by a consultation in late November 2019.
- 4.5 In 2021-22 and 2022-23 Schools Forum reaffirmed its decision on the NFF together with the maximum level of MFG which had been raised to +2%. In 2023-24 the MFG must be set between 0% and 0.5%. The LA proposes to use the MFG at the maximum level of +0.5% in 2023-24.
- 4.6 The LFF remains a draft until it has been applied to the ESFA's budget setting tool, the Authority Proforma Tool (APT) issued in December, to see if any unallocated funds remain. This was the case in 2022-23 and the balance was applied to raise the Basic Entitlement. The 2023-24 guidance sets upper limits to Basic Entitlement rates. In the unlikely event that these upper limits are reached, the LA proposes any further funds will be applied to the Growth Fund.
- 4.7 The draft LFF for 2022-23 is shown as **Appendix A** to this report. All factors except Split-Site funding and PFI are within the national funding formula.
- 4.8 The ESFA fund split-site funding on an historic lump sum and the LFF has its own criteria for allocating which was reviewed and agreed by Schools Forum for 2021-22.
- 4.9 The ESFA fund PFI costs on historic sums which are indexed every year using RPIX data (retail prices index for all items excluding mortgage interest). In 2023-24 the indexation will be 11.2% in line with RPIX growth from April 2021 to April 2022 (11.2%).
- 4.10 The changes between the 2023-24 draft and 2022-23 actual LFF are shown in **Appendix B**.
- 4.11 **Indicative** Base Line budgets are shown in **Appendix C**. These are a roll-forward from 2022-23 using October 2021 census data and have not been

adjusted for any changes in pupil numbers or pupil characteristics or other factors such as the change on MFG.

LOCAL FUNDING FORMULA APPENDIX A

NFF VALUES 2023-24

| PUPIL-LED FACTORS | | PRIMARY PER PUPIL | SECONDARY PER PUPIL |
|------------------------------|----------------------|----------------------|------------------------|
| BASIC ENTITLEMENT | KS1&2 | £3,394 | |
| | KS3 | | £4,785 |
| | KS4 | | £5,393 |
| DEPRIVATION | FSM | £480 | £480 |
| | FSM Ever 6 | £705 | £1,030 |
| | IDACI F | £230 | £335 |
| | IDACI E | £280 | £445 |
| | IDACI D | £440 | £620 |
| | IDACI C | £480 | £680 |
| | IDACI B | £510 | £730 |
| | IDACI A | £670 | £930 |
| ADDITIONAL EDUCATIONAL NEEDS | LOW PRIOR ATTAINMENT | £1,155 | £1,750 |
| | EAL | £580 | £1,565 |
| | MOBILITY | £945 | £1,360 |

| SCHOOL-LED FACTORS | |
|--|--------------|
| LUMP SUM (Each school) | £128,000 |
| RATES | Actual Costs |
| PFI | Actual Costs |
| SPLIT-SITES (LFF ONLY IN 2023-24) | |
| Primary | |
| Schools that have split sites requiring two receptions/offices | £36,000 |
| Secondary | |
| Second Site building footprint more than 50% of Main Site | £140,000 |
| Second Site building footprint less than 50% of Main Site | £70,000 |
| No Sports Hall | £75,500 |
| No Playing Field | £9,000 |

DRAFT LOCAL FUNDING FORMULA 2023-24
NFF VALUES 2023-24 + AREA COST ADJUSTMENT
1.08553

| PUPIL-LED FACTORS | | PRIMARY PER PUPIL | SECONDARY PER PUPIL |
|------------------------------|----------------------|----------------------|------------------------|
| BASIC ENTITLEMENT | KS1&2 | £3,684.29 | |
| | KS3 | | £5,194.26 |
| | KS4 | | £5,854.26 |
| DEPRIVATION | FSM | £521.05 | £521.05 |
| | FSM Ever 6 | £765.30 | £1,118.10 |
| | IDACI F | £249.67 | £363.65 |
| | IDACI E | £303.95 | £483.06 |
| | IDACI D | £477.63 | £673.03 |
| | IDACI C | £521.05 | £738.16 |
| | IDACI B | £553.62 | £792.44 |
| | IDACI A | £727.31 | £1,009.54 |
| ADDITIONAL EDUCATIONAL NEEDS | LOW PRIOR ATTAINMENT | £1,253.79 | £1,899.68 |
| | EAL | £629.61 | £1,698.85 |
| | MOBILITY | £1,025.83 | £1,476.32 |

| SCHOOL-LED FACTORS | |
|--|--------------|
| LUMP SUM (Each school) | £138,947.84 |
| RATES | Actual Costs |
| PFI | Actual Costs |
| SPLIT-SITES (LFF ONLY IN 2023-24) | |
| Primary | |
| Schools that have split sites requiring two receptions/offices | £36,000 |
| Secondary | |
| Second Site building footprint more than 50% of Main Site | £140,000 |
| Second Site building footprint less than 50% of Main Site | £70,000 |
| No Sports Hall | £75,500 |
| No Playing Field | £9,000 |

DRAFT LOCAL FUNDING FORMULA 2023-24: PRIMARY

| PUPIL-LED FACTORS | | PRIMARY PER PUPIL 2023-24 | PRIMARY PER PUPIL 2022-23 | CHANGE £ | CHANGE % |
|------------------------------|----------------------|---------------------------------|---------------------------------|-------------|-------------|
| BASIC ENTITLEMENT | KS1&2 | £3,684 | £3,550 | £134 | 3.77% |
| | | | | | |
| DEPRIVATION | FSM | £521 | £510 | £12 | 2.26% |
| | FSM Ever 6 | £765 | £640 | £126 | 19.65% |
| | IDACI F | £250 | £239 | £11 | 4.68% |
| | IDACI E | £304 | £293 | £11 | 3.84% |
| | IDACI D | £478 | £455 | £22 | 4.90% |
| | IDACI C | £521 | £499 | £22 | 4.49% |
| | IDACI B | £554 | £531 | £22 | 4.22% |
| IDACI A | £727 | £694 | £33 | 4.83% | |
| ADDITIONAL EDUCATIONAL NEEDS | LOW PRIOR ATTAINMENT | £1,254 | £1,225 | £29 | 2.35% |
| | EAL | £630 | £613 | £17 | 2.79% |
| | MOBILITY | £1,026 | £1,003 | £23 | 2.30% |

| SCHOOL-LED FACTORS | | | | | |
|--|--|--------------|--------------|--------|-------|
| LUMP SUM (Each school) | | £138,948 | £131,501 | £7,447 | 5.66% |
| RATES | | Actual Costs | Actual Costs | | |
| PFI | | Actual Costs | Actual Costs | | |
| SPLIT-SITES | | | | | |
| Schools that have split sites requiring two receptions/offices | | £36,000 | £36,000 | | |

DRAFT LOCAL FUNDING FORMULA 2023-24: SECONDARY

| PUPIL-LED FACTORS | | SECONDARY PER PUPIL 2023-24 | SECONDARY PER PUPIL 2022-23 | CHANGE £ | CHANGE % |
|------------------------------|----------------------|-----------------------------------|-----------------------------------|-------------|-------------|
| BASIC ENTITLEMENT | KS3 | £5,194 | £5,006 | £188 | 3.76% |
| | KS4 | £5,854 | £5,642 | £213 | 3.77% |
| DEPRIVATION | FSM | £521 | £510 | £12 | 2.26% |
| | FSM Ever 6 | £1,118 | £938 | £180 | 19.23% |
| | IDACI F | £364 | £347 | £17 | 4.83% |
| | IDACI E | £483 | £461 | £22 | 4.84% |
| | IDACI D | £673 | £645 | £28 | 4.34% |
| | IDACI C | £738 | £705 | £33 | 4.75% |
| | IDACI B | £792 | £759 | £34 | 4.42% |
| IDACI A | £1,010 | £965 | £45 | 4.63% | |
| ADDITIONAL EDUCATIONAL NEEDS | LOW PRIOR ATTAINMENT | £1,900 | £1,854 | £46 | 2.47% |
| | EAL | £1,699 | £1,659 | £40 | 2.42% |
| | MOBILITY | £1,476 | £1,442 | £34 | 2.39% |

| SCHOOL-LED FACTORS | | | | | |
|---|--|--------------|--------------|--------|-------|
| LUMP SUM (Each school) | | £138,948 | £131,501 | £7,447 | 5.66% |
| RATES | | Actual Costs | Actual Costs | | |
| PFI | | Actual Costs | Actual Costs | | |
| SPLIT-SITES | | | | | |
| Second Site building footprint more than 50% of Main Site | | £140,000 | £140,000 | | |
| Second Site building footprint less than 50% of Main Site | | £70,000 | £70,000 | | |
| No Sports Hall | | £75,500 | £75,500 | | |
| No Playing Field | | £9,000 | £9,000 | | |

DRAFT FUNDING FORMULA APPENDIX C

INDICATIVE BASE LINE BUDGETS ONLY. These are a roll-forward from 2022-23 using October 2021 census data and have not been adjusted for any changes in pupil numbers or pupil characteristics or other factors such as the change on MFG.

NFF UPLIFT 0.98%

| School Name | 22-23 Post MFG Budget | 22-23 School Supplementary Grant | Total Base Line | NFF Uplift | 23-24 Estimate (Baseline with NFF uplift) |
|---------------------------------------|-----------------------|----------------------------------|---------------------|-------------------|---|
| | £217,716,279 | £6,226,260 | £223,942,539 | £2,194,637 | £226,137,176 |
| Chase Lane Primary School | £3,466,364.2 | £83,203.00 | £3,549,567.19 | £34,785.76 | £3,584,352.95 |
| Whitehall Primary School | £2,058,738.7 | £57,939.00 | £2,116,677.74 | £20,743.44 | £2,137,421.19 |
| Downsell Primary School | £2,428,720.5 | £60,144.00 | £2,488,864.51 | £24,390.87 | £2,513,255.38 |
| Newport School | £3,653,513.8 | £98,503.00 | £3,752,016.79 | £36,769.76 | £3,788,786.56 |
| Chapel End Infant School and Early Ye | £1,295,570.6 | £34,216.00 | £1,329,786.55 | £13,031.91 | £1,342,818.46 |
| Edinburgh Primary School | £1,937,311.1 | £51,378.00 | £1,988,689.15 | £19,489.15 | £2,008,178.30 |
| Greenleaf Primary School | £2,035,217.7 | £55,157.00 | £2,090,374.68 | £20,485.67 | £2,110,860.35 |
| Handsworth Primary School | £1,942,737.3 | £53,625.00 | £1,996,362.29 | £19,564.35 | £2,015,926.64 |
| Thorpe Hall Primary School | £1,885,082.9 | £54,133.00 | £1,939,215.92 | £19,004.32 | £1,958,220.23 |
| The Winns Primary School | £2,855,830.9 | £77,094.00 | £2,932,924.88 | £28,742.66 | £2,961,667.54 |
| Oakhill Primary School | £958,567.0 | £26,828.00 | £985,395.02 | £9,656.87 | £995,051.90 |
| Henry Maynard Primary School | £3,787,279.8 | £101,427.00 | £3,888,706.75 | £38,109.33 | £3,926,816.08 |
| South Grove Primary School | £2,415,834.4 | £60,317.00 | £2,476,151.41 | £24,266.28 | £2,500,417.69 |
| Dawlish Primary School | £967,785.0 | £26,460.00 | £994,244.97 | £9,743.60 | £1,003,988.58 |
| Gwyn Jones Primary School | £1,954,019.8 | £53,845.00 | £2,007,864.78 | £19,677.07 | £2,027,541.86 |
| George Tomlinson Primary School | £2,181,625.7 | £57,464.00 | £2,239,089.72 | £21,943.08 | £2,261,032.80 |
| Mission Grove Primary School | £3,398,721.0 | £99,697.00 | £3,498,418.00 | £34,284.50 | £3,532,702.49 |
| Coppermill Primary School | £1,156,524.0 | £31,082.00 | £1,187,605.97 | £11,638.54 | £1,199,244.51 |
| Stoneydown Park School | £2,731,162.6 | £69,193.00 | £2,800,355.63 | £27,443.49 | £2,827,799.12 |
| Parkside Primary School | £3,101,401.8 | £84,337.00 | £3,185,738.84 | £31,220.24 | £3,216,959.08 |
| The Jenny Hammond Primary School | £1,986,596.8 | £56,098.00 | £2,042,694.77 | £20,018.41 | £2,062,713.18 |
| Ainslie Wood Primary School | £2,014,901.0 | £55,567.00 | £2,070,467.97 | £20,290.59 | £2,090,758.56 |
| Barn Croft Primary School | £1,052,853.3 | £28,188.00 | £1,081,041.27 | £10,594.20 | £1,091,635.47 |
| Chingford CoFe Primary School | £1,950,188.0 | £52,818.00 | £2,003,005.98 | £19,629.46 | £2,022,635.44 |
| St Mary's Catholic Primary School | £1,028,774.1 | £27,771.00 | £1,056,545.13 | £10,354.14 | £1,066,899.27 |
| St Joseph's Catholic Junior School | £851,631.6 | £24,580.00 | £876,211.56 | £8,586.87 | £884,798.43 |
| St Joseph's Catholic Infant School | £756,092.5 | £21,612.00 | £777,704.51 | £7,621.50 | £785,326.02 |
| Our Lady and St George's Catholic Pri | £1,754,591.2 | £51,289.00 | £1,805,880.21 | £17,697.63 | £1,823,577.84 |
| St Patrick's Catholic Primary School | £1,834,183.5 | £51,993.00 | £1,886,176.54 | £18,484.53 | £1,904,661.07 |
| Frederick Bremer School | £6,660,193.4 | £176,779.00 | £6,836,972.40 | £67,002.33 | £6,903,974.72 |
| Heathcote School & Science College | £6,564,649.5 | £189,203.00 | £6,753,852.48 | £66,187.75 | £6,820,040.23 |
| Willowfield School | £6,256,053.9 | £186,612.00 | £6,442,665.91 | £63,138.13 | £6,505,804.03 |
| Leytonstone School | £6,471,950.9 | £186,135.00 | £6,658,085.86 | £65,249.24 | £6,723,335.10 |
| Walthamstow School for Girls | £6,037,876.0 | £174,495.00 | £6,212,371.00 | £60,881.24 | £6,273,252.24 |
| Kelmscott School | £6,152,659.8 | £177,892.00 | £6,330,551.84 | £62,039.41 | £6,392,591.25 |
| Holy Family Catholic School | £6,751,724.5 | £210,749.00 | £6,962,473.47 | £68,232.24 | £7,030,705.71 |
| Buxton School | £7,394,420.4 | £222,051.00 | £7,616,471.40 | £74,641.42 | £7,691,112.82 |
| Lime Academy Larkswood | £3,057,767.5 | £82,197.00 | £3,139,964.46 | £30,771.65 | £3,170,736.11 |
| Yardley Primary School | £1,952,854.3 | £55,879.00 | £2,008,733.34 | £19,685.59 | £2,028,418.93 |
| Davies Lane Primary School | £3,874,835.3 | £106,225.00 | £3,981,060.26 | £39,014.39 | £4,020,074.65 |
| Hillyfield Primary Academy | £6,281,812.3 | £159,743.00 | £6,441,555.28 | £63,127.24 | £6,504,682.52 |
| Emmanuel Community School | £1,011,867.8 | £29,447.00 | £1,041,314.80 | £10,204.89 | £1,051,519.69 |
| Willow Brook Primary School Academ | £2,924,530.6 | £83,423.00 | £3,007,953.60 | £29,477.95 | £3,037,431.54 |
| The Woodside Primary Academy | £5,412,509.1 | £155,505.00 | £5,568,014.14 | £54,566.54 | £5,622,580.67 |
| Chapel End Junior Academy | £1,631,269.2 | £45,096.00 | £1,676,365.17 | £16,428.38 | £1,692,793.55 |
| Riverley Primary School | £2,258,325.1 | £56,691.00 | £2,315,016.05 | £22,687.16 | £2,337,703.21 |
| Sybourn Primary School | £2,427,569.8 | £71,814.00 | £2,499,383.81 | £24,493.96 | £2,523,877.77 |
| Thomas Gamuel Primary School | £1,583,640.7 | £45,909.00 | £1,629,549.73 | £15,969.59 | £1,645,519.32 |
| Walthamstow Primary Academy | £1,042,342.7 | £31,500.00 | £1,073,842.67 | £10,523.66 | £1,084,366.32 |
| Roger Ascham Primary School | £2,034,228.5 | £58,019.00 | £2,092,247.48 | £20,504.03 | £2,112,751.51 |
| Longshaw Primary Academy | £1,439,459.6 | £41,286.00 | £1,480,745.61 | £14,511.31 | £1,495,256.92 |
| Salisbury Manor Primary School | £1,566,670.8 | £46,206.00 | £1,612,876.80 | £15,806.19 | £1,628,682.99 |
| Woodford Green Primary School | £972,502.6 | £28,369.00 | £1,000,871.59 | £9,808.54 | £1,010,680.13 |
| Whittingham Primary Academy | £1,967,855.9 | £54,445.00 | £2,022,300.93 | £19,818.55 | £2,042,119.48 |
| Mayville Primary School | £1,781,833.0 | £51,066.00 | £1,832,898.97 | £17,962.41 | £1,850,861.38 |
| St Saviour's Church of England Primar | £1,653,704.6 | £44,011.00 | £1,697,715.59 | £16,637.61 | £1,714,353.20 |
| St Mary's CoFe Primary School | £2,482,640.3 | £67,239.00 | £2,549,879.31 | £24,988.82 | £2,574,868.13 |
| Barclay Primary School | £5,874,375.0 | £162,807.00 | £6,037,182.02 | £59,164.38 | £6,096,346.40 |
| Selwyn Primary School | £2,930,919.4 | £84,191.00 | £3,015,110.38 | £29,548.08 | £3,044,658.46 |
| South Chingford Foundation School | £3,622,522.6 | £111,329.00 | £3,733,851.64 | £36,591.75 | £3,770,443.39 |
| Eden Girls' School Waltham Forest | £4,259,012.0 | £131,630.00 | £4,390,642.03 | £43,028.29 | £4,433,670.32 |
| Connaught School for Girls | £4,063,857.7 | £126,261.00 | £4,190,118.73 | £41,063.16 | £4,231,181.89 |
| Norlington School and 6th Form | £4,858,976.2 | £141,716.00 | £5,000,692.22 | £49,006.78 | £5,049,699.00 |
| Lammas School and Sixth Form | £5,390,351.8 | £148,970.00 | £5,539,321.82 | £54,285.35 | £5,593,607.17 |
| Highams Park School | £7,464,592.3 | £244,910.00 | £7,709,502.28 | £75,553.12 | £7,785,055.40 |
| Chingford Foundation School | £8,131,492.0 | £253,458.00 | £8,384,949.96 | £82,172.51 | £8,467,122.47 |
| Walthamstow Academy | £6,135,446.8 | £201,356.00 | £6,336,802.83 | £62,100.67 | £6,398,903.49 |
| George Mitchell School | £5,895,164.4 | £175,688.00 | £6,070,852.37 | £59,494.35 | £6,130,346.72 |

| | | | |
|----------------------------------|--|-------------|----------|
| Meeting / Date | SCHOOLS FORUM 16 November 2022 | Agenda Item | 5 |
| Report Title | Early Years Block: Early Years funding formula planning for free early education payments for 2-, 3- and 4-year-olds for 2023-24 | | |
| Decision/Discussion/ Information | For information | | |
| Report Author/ Contact details | Eve McLoughlin, Head of Early Years, Childcare & Business Development Service Tel: 020 8496 3576 eve.mcloughlin@walthamforest.gov.uk | | |
| Appendices | Appendix A: E-Mail to early years providers regarding Early Years Task and Finish Group, 30 September 2022 Appendix B: Terms of Reference Early Years Task & Finish group - 2023-24 | | |

1. SUMMARY

- 1.1 This report sets out the proposed plan for the development of the early years funding formula for free education payments for 2-, 3- and 4-year-olds for 2023-24

2. RECOMMENDATIONS

2.1 Schools Forum to note:

- 2.1.1 The proposed timeline set out in Table 1 should form the basis of development of the 2023-24 early years funding formula (EYFF).

- 2.1.2 That an Early Years Task and Finish Group (EYTFG) has been established as set out in Appendix A and B to review and make recommendations on:

- The 2023-24 Early Years Block funding;
- The wider consultation with all FEEE providers regarding the 2023-24 Early Years Funding Formula (EYFF) for 2-, 3- and 4-year-olds; and
- The 2023-24 provider EYFF hourly payment rates for 2-, 3- & 4-year-olds.

2.1.3 The DfE’s EYNFF operational guidance states that at least 95% of the Early Years Block funding of the DSG in respect of three- and four-year-olds MUST be passed through to providers.

3. REASON

3.1 The LA is required to consult annually with Schools Forum on arrangements for Early Years provision.

4. BACKGROUND

4.1 The DfE/ESFA have not yet published Early Years Block budget allocations for 2023-24. Allocations are usually published around mid-December but may be delayed slightly due to the DfE carrying out a consultation on proposed amendments to the basis for Early Years block funding for financial year 2023-24. The consultation ran from 4 July 2022 to 16 September 2022.

4.2 The LA will work on the basis that the funding arrangements will return to normal for 2022-23 financial year and be based on the January 2022 census counts and plan for 2023-24 accordingly.

5. PLAN FOR THE DEVELOPMENT OF THE 2023-24 EYFF

5.1 The proposed plan is outlined below in Table 1 below:

| Date | Action |
|--------------------|---|
| 30 September 2022 | Expressions of interest sought from all providers of free early education to become a member of the EYTFG. (Appendix A) |
| 7 October 2022 | Closing Date for expressions of interest for EYTFG |
| 1 November 2022 | First meeting of the EYTFG |
| Mid-December 2022 | Expected publication by DfE/ESFA of provisional 2023-24 Early Years DSG block allocations |
| 13 December 2022 | Second meeting of the EYTFG |
| 18 January 2023 | Report to Schools Forum on the indicative modelling for 2023-24 EYFF |
| Early January 2023 | Online consultation with all FEEE providers on the proposed EYFF and group question and answer sessions run for providers |

| | |
|------------------|---|
| Mid-January 2023 | Analysis of consultation responses |
| 26 January 2023 | Final meeting of the EYTFG |
| 08 February 2023 | Report to Schools Forum on the proposed EYFF 2023-24 for approval |

6. CONSULTATION

- 6.1 An online consultation is planned in early January 2023. Providers will be made aware of the consultation via the Early Years newsletter on the Hub website. In addition, e-mails will be sent to all Chairs of Governors, Headteachers and Ofsted registered PVI sector providers advising them of the consultation as well as a link to the online survey.
- 6.2 Q&A sessions will also be held during the consultation week which providers can attend should they wish to.
- 6.3 EYTFG members will also be required to make their respective sector aware of the consultation and encourage them to respond. A hard copy of the consultation questions will be made available to enable respondents to discuss and agree a collective response before submitting their answers online.

Appendix A

E-mail regarding Early Years Task and Finish Group, 30 September 2022

HAVE YOUR SAY ON EARLY YEARS FUNDING IN 2023/24

DEADLINE FOR RESPONSE FRIDAY 7 OCTOBER 2022

FAO: Managing Directors / Chairs of Trustees / Sole Traders / Operation Managers and Finance Officers

Dear All,

In line with the LA's statutory duty and as notified to the Borough's Schools Forum, I will be setting up and chairing an Early Years Task and Finish Group with FEEE providers across all sectors.

The remit of this group will be to **review and make recommendations on:**

- The Early Years Block 2023-24 funding;
- The wider consultation with all FEEE providers regarding new 2023-24 Early Years National Funding Formula (EYNFF) for 2-, 3- & 4-year-olds;
- The 2023-24 Early Years National Funding Formula (EYNFF) hourly payment rates for 2-, 3- & 4-year-olds

In order to ensure the effectiveness of the group it is important that we have diverse membership across range of roles within schools/settings. We are hoping to achieve 10% representation from the sector currently delivering FEEE places, this equates to the following number of representatives from each sector:

- 3 Maintained Schools (including Maintained Nursery Schools)
- 2 Academies
- 3 to 4 PVI term time providers
- 3 to 4 PVI year-round / full day-care providers (open more than 38 weeks per year and open between 8am and 6pm as a minimum)
- 5 Childminders

Expressions of interest to be part of this group are invited from Senior Leaders from School and PVI sector providers who:

- Are fully up to date with their Headcount returns, in line with the FEEE Financial procedures; and
- Have a good working knowledge of early years funding.

Members will be expected to disseminate information from the Early Years Task and Finish group to their respective sector and to collate their views for presentation at the Early Years Task and Finish Group. The membership of this group will also include LBWF service managers and officers.

We encourage those of you who provide free early education places to 2, 3 & 4 year-old children to become actively involved to ensure that your sector is truly represented and your opinions are heard.

Representatives will be expected to be able to attend all meetings between November 2022 and February 2023, so please do not express an interest in becoming a part of this group if you are unable to commit to attendance during this period.

Key dates:

- 10am to 1pm Tuesday 1 November 2022
- 10am to 1pm Tuesday 13 December 2022
- 10am to 1pm Thursday 26 January 2023

All expressions of interest should be returned by email no later than midnight on FRIDAY 7 OCTOBER to FEEEprovision@walthamforest.gov.uk

If we have more applicants than available places on the group, applicants will be asked to provide a pen portrait of no more than 200 words by Friday 14 October 2022 to be circulated to all FEEE providers to decide on electing a representative for that group. The vote will take place on 17 and 18 October 2022. The final group members will be announced on Monday 24 October 2022.

Appendix B



London Borough of Waltham Forest

Terms of Reference

Early Years Task and Finish Group

2023/2024

1. ESTABLISHMENT

The Early Years Task & Finish Group (the Group) is established as a time limited sub group of Waltham Forest School's Forum. As such, all principles will closely align with those of the Schools Forum.

The Early Years Task & Finish Group and Waltham Forest School's Forum will work together as strategic partners to co-operate on matters falling within the aims and objectives of the group.

This Group will, wherever possible, try to achieve consensus between the key partners providing Free Early Education in the Borough in line with the relevant statutory guidance.

2. AIMS AND OBJECTIVES OF THE GROUP

The aim of the Group is to take make recommendations to Schools Forum, based on wider consultation with FEEE providers operating in the Borough, and in line with the Governments statutory guidance on matters regarding:

- The Early Years Block 2023-24 funding;
- The wider consultation with all FEEE providers regarding new 2023-24 Early Years National Funding Formula (EYNFF) for 2,3 & 4 year olds;
- The new 2023-24 Early Years National Funding Formula (EYNFF) hourly payment rates for 2,3 & 4 year olds; and
- The impact/implications of any new statutory requirements

Decision Making Powers of the Group:-

- The Group do not have decision making powers
- The Schools Forum may refuse or approve the recommendations of the Group subject to modifications.

3. MEMBERSHIP OF THE GROUP

It was aimed to achieve 10% representation from the sector currently delivering FEEE places. The final membership and composition of the Group is based on the number of operational FEEE providers that expressed an interest in becoming a member of the group in line with the published criteria before the deadline date of 7th October 2022. In order to ensure the effectiveness of the group it is important that we have diverse membership across range of roles within schools/settings.

Only Provider Representative Members have a vote. There must be at least 1 member from each sector for a vote to be held.

The final Provider Representative Membership is agreed as:

- 3 Maintained Schools (including Maintained Nursery Schools)
- 2 Academies
- 3 to 4 PVI term time providers
- 3 to 4 PVI year-round / full day-care providers (open more than 38 weeks per year and open between 8am and 6pm as a minimum)
- 5 Childminders (may be filled by a LA nominated Early Years Teaching & Learning Consultant if we are unable to fill all places)

The Voting Members of the Group are:

| Sector | Name | School/Setting Name |
|--|------------------|--|
| Maintained Schools (including Maintained Nursery Schools* | Helen Currie | Church Hill & Low Hall Nursery Schools |
| | Tracey Griffiths | Barn Croft Primary School |
| | Katie Jennings | Mission Grove Primary School |
| Academies | Sharon Parsons | Mayville Primary |
| | Vacant | |

| | | |
|--|-------------------|--|
| PVI term time providers | Ruth Mattison | Handsworth Pre-school |
| | Pam Chapman | Shernhall Pre-School |
| | Vacant | |
| 3 to 4 PVI year-round / full day-care providers | Denise O'Sullivan | Little Diamonds Nursery |
| | Anuta Dunca | 1 st Stepping Stones Nursery School |
| | Hannah McCarthy | Footsteps Day Nursery |
| Childminders | Donia Duffy | LBWF (Representing Childminders) |

Non-voting members - LBWF Officers:

| | | |
|-------------------|-------------------------|--|
| LBWF staff | Eve McLoughlin | Head of Early Years Childcare and Business Development (Chair) |
| | Elisha Brett | Deputy Head of Early Years Childcare and Business Development |
| | Mohammad Akhtar | Early Years Finance & Business Manager |
| | Gurpreet Kataora | Head of School Business Support |

Non-voting Advisors to the group to attend as and when required / invited:

| | | |
|--|--------------------------|--|
| | Duncan James-Pike | Strategic Finance Advisor – Finance Team (High Needs Block & Early Years Block) |
| | Kashif Nawaz | Interim Assistant Director – SEND Service (Special Educational Needs & Disabilities) |

Clerk to the meeting is Temi Adeniji: temilade.adeniji@walthamforest.gov.uk

Members are appointed to the Group for the period November 2022 to March 2023.

A member ceases to be a member of the Group if he or she resigns from the Group or no longer occupies / is a member of the office or body which he or she was nominated to represent.

Observers will be able to attend meetings to ask questions and contribute to the discussion but will not be able to vote. Voting members will be able to vote on their behalf.

Observers must provide details of their intention to attend the meeting to the clerk in advance of their attendance;

Officers employed by the Local Authority / Families Directorate who have a role in the strategic development of Early Years and associated services are non-voting members of the Group.

They will provide advice to the Group on professional issues, including reports before them, matters of procedure and advice and guidance on changes to Government guidance or policy and make recommendations on the EYNFF.

4. MEETINGS AND PROCEEDINGS OF THE GROUP

All meetings papers, agendas and minutes are will be made available to the group. Communication links will also be set up on The Hub to enable sector representative to share information with and receive feedback from their respective sector.

Meetings will be held at suitable venues in the Borough as may be considered appropriate in the circumstances. The decisions as to where to hold meetings shall ultimately lie with the Chair of the Group.

The Group shall meet no less than 3 times during the period November 22 and March 23.

The Group may establish and set terms of reference for subcommittees and working groups as required, subject to first obtaining the advice of the Chair of the Group as to the necessity for such arrangements.

Members who fail to attend two consecutive meetings without a satisfactory explanation will have their membership reviewed by the Group.

5. Agenda Planning / Despatch of Papers

The responsibility for setting the agenda for the Group lies with the Chair. The Chair shall ensure that all matters falling within the remit of the Group are placed on an appropriate agenda for consideration by the Group in a timely manner.

In this regard meetings need to be scheduled at appropriate points in order to enable the Group to consider outcomes of local consultations and national announcements. The frequency and timing of meetings shall be agreed in advance of the next meeting.

Items for inclusion on the agenda for the Group (submitted by a member of the Group) must be submitted to the Chair of the Group not less than 10 working days before a scheduled meeting of the Group

Agendas and reports will generally be circulated by the Chair of the Group at least 5 working days before the meeting to which they relate.

6. Quorum

The quorum for any Group meeting shall be at least 40% of the voting membership. At least one representative of each of the sectors must be present and voting.

7. Declaration of Interests

Members of the Group will have regard to the Local Code of Conduct for Members.

Interests whether personal or pecuniary, should be declared at the outset of the meeting and before the item is discussed. A member with a pecuniary interest or disclosable pecuniary interest (DPI) beyond or over and above those interests of the generality of the group they represent) shall declare that interest as soon as it becomes apparent. The member may be present for the introduction of the Item and presentation of a report by the presenting officer, make representations, answer questions and give evidence in response to that presentation before

leaving the room. A member with a pecuniary or disclosable pecuniary interest (DPI) may not take part in the Group's debate on the item, the decision and/or vote.

In considering whether or not to declare a pecuniary or disclosable pecuniary interest, a member of the Group should apply the following test: 'Would a member of the public, knowing the facts of the situation, reasonably think the member might be influenced by the interest?' A pecuniary or disclosable pecuniary interest would include the situation whereby a proposal uniquely affects either a school/setting at which they are a head teacher / governor/Managing Director or Business owner or which their children attend / close family members are employed at.

If a member knows, or ought to know, that they will have a pecuniary or disclosable pecuniary interest in any matter being discussed by the Group they are encouraged to send a substitute (nominated in accordance with the Constitution) to the meeting in their place.

8. Voting Procedures

The Group shall always seek to operate on a consensus basis. If it is not possible to reach a consensus, members will be required to undertake a formal vote on the matter before them. Each member will have one vote. Votes cast will be carried on a simple majority basis which will be recorded. In the event of an equal number of votes for and against a proposal this will be recorded.

9. Clerk to the Group

The Group will be clerked by an employee of the Council. The specific responsibilities of the Clerk will be to:

- convene meetings of the Group;
- arrange accommodation for meetings;
- co-ordinate and act as secretariat to meetings;
- copy, circulate and dispatch appropriate papers;
- publish papers on The Hub website;
- make and maintain a record of the Membership and all proceedings of the Group.

10. FREEDOM OF INFORMATION

Request for Information under the Freedom of Information Act (FOIA) 2000 will be handled in accordance with the Council's published procedures for dealing with such requests. Any Member of the Group receiving a request under the FOIA will be required to pass that request to the Chair of the Group within 24 hours of receipt of that request in order that the Education Support Service may deal with the request on behalf of the Group within the 20 working day time limit.

11. COMPLAINTS / DISPUTES

The Group is intended to be a collaborative, co-operative body and needs to ensure that no particular sector or member is unduly favoured. Problems and issues should normally be debated and resolved at the Group meetings.

However, if parties feel that these have not been resolved, the following process should be followed and minutes taken.

Stage 1: Complaints from member/s of the group or issues of non-compliance with the terms of reference will in the first instance, be referred in writing to the Chair of the Group. The parties who are in dispute will meet with the Chair of the Group who will investigate and attempt to reach satisfactory resolution through discussion with the representative/s concerned.

Stage 2: In the event of satisfactory resolution not being reached, the matter will be referred to the Chair of Schools Forum for a final decision.

12. Local Code of Conduct for Members

All Members must comply with the following standards when carrying out your official duties:

- a. To act solely in the public interest and never improperly attempt to or actually confer an advantage or disadvantage on any person or improperly act to gain financial or other material benefits for themselves, their family, friends or close associates.
- b. Not to place themselves under a financial or other obligation to outside individuals or organisations that might seek to influence them in the performance of their official duties.
- c. To make all decisions on merit when carrying out public duties, such as making public appointments or awarding contracts.
- d. To be accountable for their decisions to the public and to cooperate fully with whatever scrutiny is appropriate to their office.
- e. To be open about their decisions and actions and the decisions and actions of their authority and Members should be prepared to give reasons for those decisions and actions.
- f. When using or authorising the use by others of the resources of this authority, ensure that such resources are not used improperly for political purposes (including party political purposes) and members must have regard to any statutory guidance made under the Local Government Act 1986.
- g. To comply with the law (including the Council's Access to Information Rules) in respect of the disclosure and confidentiality of information held by the Council and to seek advice before disclosing personal or other confidential information.
- h. To treat others with respect and not to bully or harass any person.
- i. To promote and support high standards of conduct when serving in their office, particularly those set out in a. to h. above, by leadership and by example.

LONDON BOROUGH OF WALTHAM FOREST

| | | | |
|-----------------------------------|---|-------------|----------|
| Meeting / Date | SCHOOLS FORUM 16 November 2022 | Agenda Item | 6 |
| Report Title | Maintained Nursery Schools Business Rates | | |
| Decision/ Discussion/ Information | For Discussion | | |
| Report Author/ Contact details | Eve McLoughlin – Head of Early Years & Business Development Service eve.mcloughlin@walthamforest.gov.uk - 020 8496 3576 Mohammad Akhtar – Early Years Finance & Business Manager mohammad.akhtar@walthamforest.gov.uk - 020 8496 2784 | | |
| Appendices | Appendix A: Waltham Forest’s response to the DfE consultation: “Changes to the payment process of schools business rates” in April 2021 | | |

1. INTRODUCTION

- 1.1 This report informs Schools Forum that the LA intends to consult with schools and academies in the two weeks 21 November to 2 December on a proposal to continue transfer £55,000 (0.02%) of the Schools Block to the Early Years Block in 2023-24 to fund Business Rates for the three Maintained Nursery Schools (MNS) in Waltham Forest: Acacia, Church Hill, and Low Hall.

2. RECOMMENDATIONS

Schools Forum to note:

- 2.1 The LA intends to consult with schools and academies in the two weeks 21 November to 2 December on a proposal to continue in 2023-24 to transfer £55,000 (0.02%) of the Schools Block to the Early Years Block in 2023-24 to fund Business Rates for the three Maintained Nursery Schools (MNS) in Waltham Forest: Acacia, Church Hill, and Low Hall.
- 2.2 This proposal will be consulted on in conjunction with the proposal for an inter-block transfer for support for Reception age pupils from the Schools Block to the High Needs Block (see Item 10 on this agenda)
- 2.2.3 The total annual business rates costs for all three MNS is circa £55,000. To address the disparities in funding for rates between MNS and primary and secondary schools, it is proposed that £55,000 is transferred from the Schools Block to the Early Years Block to fund MNS rates for a further year to support MNS during financial year 2023-24. The LA will continue to discuss this issue with the DfE/EFSA. Our hope is that by 2024-25 these issues will be resolved as part of any changes to schools’ business rates funding or EY DSG funding

levels and/or permissible supplements, which will negate the need for inter block transfers in future years.

3. BACKGROUND OF FUNDING FOR MNS

- 3.1 In Waltham Forest, we have 3 MNS; Acacia in Cann Hall ward, Church Hill in Hoe Street ward and Low Hall in Markhouse ward.
- 3.2 All 3 MNS in Waltham Forest have struggled for several years to achieve financial sustainability. 1 MNS has a small reserve, whilst the other 2 operate with an in-year deficit. This is a picture that is reflected nationally.
- 3.3 In research carried out by the National Education Union¹, the percentage of MNS in deficit rose from 3.5% in 2009-10 to 20.8% in 2019-20 and the total deficit rose from £6.7m to £8.8m in 2019-20 financial year.
- 3.4 A survey carried out by Early Education, NAHT, NEU and UNISON in April 2021² showed that 46% of MNS that responded to the survey would be in deficit by March 2021. The average deficit reported was £76,000 across the 200 MNS that responded to the Survey in March/April 2021.
- 3.5 Historically there has been a fundamental unfairness in the funding arrangements for MNS when compared to funding for other maintained schools. The funding issues faced by our three MNS in Waltham Forest were highlighted in the November 2021 Schools Forum report
- 3.6 The report stated that MNS are required to employ a headteacher, qualified teachers, a SENCO (Special Educational Needs Coordinator) and staff with level 3 qualifications, while PVIs (Private, Voluntary, and Independent providers) need to employ only one staff member with a level 3 qualification, and half of their remaining staff at level 2.
- 3.7 In recognition of these higher costs for MNS compared to other early years providers, the Government has provided additional supplementary funding to MNS since the introduction of the EYNFF in 2017-18. This funding was initially intended to last for two years only but has been subsequently extended.

4. BUSINESS RATES

- 4.1 During Summer 2021 the Head of Early Years Childcare and Business Development Service lead on a joint Heads of Early Years (HEY) letter via London Councils addressing the funding issues in the EY sector which also highlighted the issue of MNS funding. The joint HEY letter also raised the issue of Business Rates and stressed that it was vital that the funding of business rates for MNS across the country were considered as a part of the proposed changes to the way schools business rates are paid to Local Authorities, as this would assist with the long-term sustainability of these services and ensure parity with other DfE registered schools. Unfortunately this issue was not addressed as part of these changes.

- 4.2 The disparity in funding business rates between Early Years providers (funded from the Early Years DSG) and 5–16-year-old providers (funded from Schools DSG) has also been challenged with the Treasury by The National Day Nurseries Association (NDNA), however, this was rejected in 2018³.
- 4.3 There are two further disparities specific to MNS rates: where primary schools have nursery provision within the school this is included in the Business Rates funding that schools receive; and MNS are unable to apply for Business Rates reductions in the same way some PVI settings that are voluntary organisations (e.g., registered charities) can.
- 4.4 MNS used to receive funding for rates via a premises supplement previously, however, this was removed when the Early Years National Funding Formula (EYNFF) was introduced as only supplements related to deprivation, quality, flexibility, rurality/sparsity, and English as an Additional Language (EAL) were permitted. This was reported to Schools Forum in November 2013 when rates were excluded from the consolidated hourly rate for maintained nursery schools.
- 4.5 Schools Forum agreed a transfer of £55k from the Schools Block to the Early Years Block during 2022-23 to cover the costs of the business rates in MNS, which MNS's greatly appreciated.

5 DfE/EFSA CONSULTATION PROPOSALS FOR 2023-24 EARLY YEARS DSG FUNDING

- 5.1 The DfE/ESFA have not yet published Early Years Block budget allocations for 2023-24. Allocations are usually published around mid-December but may be delayed slightly due to the DfE carrying out a consultation on proposed amendments to the basis for Early Years block funding for financial year 2023-24. The consultation ran from 4 July 2022 to 16 September 2022.
- 5.2 The proposals in the consultation document suggested that the DfE/ESFA were looking to begin to address some of the historic disparities in level of MNS supplement that Local Authorities receive, but the level of funding will not be confirmed until the final EY DSG budget announcement in December 2022.
- 5.3 The DfE/EFSA have not set out any intention in the consultation documentation to fund business rates for MNS in 2023-24 in the same way as they are funded for other maintained schools but have consulted on using business rates levels in Local Authorities to inform the hourly rate that the Local Authority receives for all providers. The level increase to the hourly rate is likely to be minimal and will not be confirmed until the final EY DSG budget announcement in December 2022.
- 5.7 The indicative Schools Block for 2022-23 has been announced as £226.2 million and the proposed transfer represents 0.02% of the Schools Block, approximately £1.47 per pupil.

Appendix A: Waltham Forest’s response to the DfE consultation: “Changes to the payment process of schools business rates” in April 2021

“The issue of Maintained Nursery Schools (MNS) business rates funding needs to be resolved.

MNS are DfE registered schools, and as such must meet additional requirement with regards to staffing requirements which Ofsted registered PVI sector childcare providers do not, such as, a Headteacher, a teacher who is responsible for co-ordinating SEN provision and Free Early Education Provision that must be delivered under the direction and supervision of a qualified or nominated teacher.

This and the fact that MNS are small schools significantly increase the unit cost of delivering a Free Early Education Place in a MNS as opposed to Ofsted registered PVI sector childcare providers and larger DfE Registered Primary Schools that deliver their free early education places to 2,3- & 4-year-olds via their school nursery provision.

As MNS are funded via the Early Years Block of the DSG they do not benefit from re-imbursment of their business rates, unlike maintained schools who deliver their nursery class places as part of their overall school provision and as a result benefit from re-imbursment of their business rates for the whole school via the Schools Block of the DSG. Similarly, as MNS do not have charitable status, they are not eligible for 100% discretionary relief, which some voluntary organisations like PVI sector Ofsted registered providers would be able to benefit from.

The DfE have been reviewing for some time, the way MNS are funded in the long term, however, we feel it is vital that the funding of business rates for MNS across the country are considered as a part of this change in the way business rates are paid to Local Authorities to ensure their long-term sustainability of these services and ensure parity with other DfE registered schools and not for profit organisations.”

LONDON BOROUGH OF WALTHAM FOREST

| | | | |
|---|---|-------------|----------|
| Meeting / Date | SCHOOLS FORUM 16 November 2022 | Agenda Item | 7 |
| Report Title | High Needs Mid-Year Update | | |
| Decision/ Discussion/ Information | For Information | | |
| Report Author/ Contact details | Duncan James-Pike m Strategic Finance Advisor, duncan.james-pike@walthamforest.gov.uk Lauren Ovenden, Director of Education lauren.ovenden@walthamforest.gov.uk | | |
| Appendices | Appendix A: HN Expenditure projections | | |

1. SUMMARY

- 1.1 This report updates School Forum on the current year-end projection for the High Needs Block, including the High Needs Supplementary Grant, and the development of the DSG Management Plan.

2. RECOMMENDATION

Schools Forum to note:

- 2.1 That the projected outturn for the High Needs Block is a deficit of £170,000 but this is dependent on the outcome for significant risks within the assumptions used in the projections for the second half of the financial year.
- 2.2 The progress report on the development of the DSG Management Plan.

3. REASON

- 3.1 The LA provides Schools Forum with updates on High Needs expenditure as part of the programme to develop its DSG management plan. This plan is required under the DSG grant conditions, as Waltham Forest has an historic deficit on High Needs and the overall DSG balance is projected to show an overall rising deficit due to the reserves of other blocks reducing due to commitments being funded as planned.

- 3.2 The table below shows that even if the High Needs Block (HNB) were to balance in 2022-23, the overall position on the DSG would seem to deteriorate as the Early Years Block reduce as planned.

| | Actual March 2021 £ | Actual March 2022 £ | Projected March 2023 £ |
|-------------------------------------|---------------------------|---------------------------|------------------------------|
| DSG DEFICIT 2021 to 2023 | | | |
| Schools Block including Growth Fund | 1,393,029 | 884,967 | 712,040 |
| Central Services Block | 0 | 42,944 | 30,455 |
| Early Years Block | 2,672,976 | 997,746 | 274,529 |
| High Needs Block | -5,007,516 | -4,689,142 | -4,689,142 |
| DSG DEFICIT | -941,511 | -2,763,485 | -3,672,118 |

4. HIGH NEEDS PROJECTION AT MONTH 6

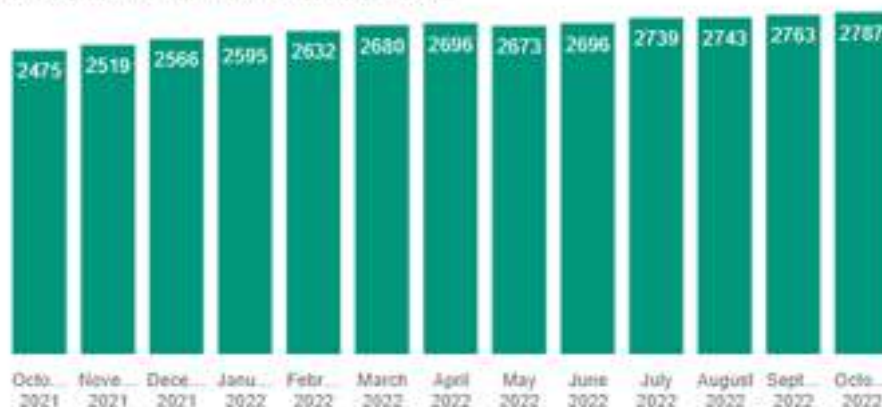
- 4.1 The High Needs Block is projected to overspend by £170,000 in 2022-23 as at Month 6 (September). This includes the additional funding from the High Needs Supplementary Grant (HNSG) detailed below.
- 4.2 There are significant risks in the underlying assumptions and there are several institutions, principally FE colleges and out-borough settings where fees for academic year 2022/23 have not been finalised.
- 4.3 Appendix A shows the allocation, projected expenditure, and variance for each sub-block, summarised in the Table below:

| Description | Budget 2022-23 Version 3 £k | Forecast M6 £k | Variance £k | |
|---|-----------------------------------|-------------------|----------------|-------------|
| HIGH NEEDS INCOME | 42,117 | 42,117 | 0.00 | |
| LBWF SCHOOLS | 26,020 | 26,074 | -55 | |
| OTHER SCHOOLS | 4,631 | 4,688 | -57 | |
| ALTERNATIVE PROVISION | 2,691 | 2,489 | 202 | |
| PRU | 1,375 | 1,340 | 35 | |
| POST 16 | 2,963 | 3,000 | -37 | |
| CONTRACTS | 1,283 | 1,326 | -44 | |
| OTHER COSTS | 3,005 | 3,369 | -364 | |
| TOTAL GROSS HIGH NEEDS EXPENDITURE | 41,967 | 42,287 | -320 | |
| CONTINGENCIES | 150 | 0 | 150 | |
| TOTAL NET HIGH NEEDS EXPENDITURE | 42,117 | 42,287 | -170 | OVER |

- 4.4 There were two reductions to the HNB allocation from that reported in February 2022: £155,000 from an adjustment to the basic entitlement and £321,000 from the final determination of the import/export adjustment – the lagged payments reflecting the place funding of residents of one LA being educated in another. These reductions were absorbed by reductions in the growth contingency and from the HNSG.

- 4.5 The largest sub-block, LBWF Schools, shows the largest increase and the bulk of the Growth Contingency was allocated here. This increase is derived largely from the rise in EHCPs in mainstream schools costing some £2 million and £479,000 needed to raise the “new” Resource Ladder in line with the 2021-22 pay award and the National Insurance levy.
- 4.6 The number of EHCPs continues to rise steeply and increased by 312 (12.6%) between October 2021 and October 2022 as shown in the figure below:

Number of Children with an EHC Plan | Trend



- 4.7 There was a reduction in projected spend in the Alternative Provision sub-block, mainly due to fewer AP college places being commissioned and unused allocations for new provisions not opening until 2023-24.
- 4.8 The “Other Costs” sub-block includes EHCPs for under 5s which at £868,000 is substantially over the £550,000 allocated.
- 4.9 The unspent contingency of £150,000 represents the balance on the HNSG intended to support "Hot Spots": schools with over 4% of pupils with EHCPs, but which is unaffordable in the context of a projected overspend.
- 4.10 The HNSG of £1.8 million was deployed as follows:

| Deployment of High Needs Supplementary Grant | £ |
|---|------------------|
| Indexation of new Resource Ladder for pay awards & levy | 479,900 |
| Special Schools H&SC levy and other costs | 363,848 |
| Change in Import and Export Adjustment | 321,000 |
| Independent Schools and Other LAs (pay awards & levy) | 183,000 |
| Post 16 (pay awards & levy) | 170,000 |
| Support to inclusive schools (SEND "hot spots") | 150,000 * |
| Mainstream EHCP growth | 136,573 |
| Section 75 Agreement (SALT & OT) | 35,000 |
| Supplementary Grant Total | 1,839,321 |

*not implemented

5. DEDICATED SCHOOLS GRANT AND HIGH NEEDS MANAGEMENT PLAN

5.1 Background

5.1.1 As a requirement of the Dedicated Schools Grant, we are required to have a DSG management plan and the DfE have provided an exceptionally comprehensive tool to complete to enable us to have a robust analysis to enable us to identify potential efficiencies and areas where further scrutiny is required.

5.1.2 The LA has set up a working group to look at the template which includes the Director of Education, Strategic Finance Advisor for Education, Assistant Director for SEND and our Head of Business Intelligence. This will form the basis of the summary narrative and management plan that we are aiming to bring to Schools Forum in December. As a consequence of work undertaken to date, the LA is seeking to recruit a senior data analyst to work specifically on education data quality and connectivity across systems in education. We will keep Schools Forum informed of progress.

5.1.3 The LA has also established an internal governance board to monitoring the High Needs Budget and this group will then agree reports to Schools Forum. We anticipate that there will be several task and finish groups that will need to undertake deep dives as the work develops over coming months and would welcome support from school colleagues as well as the Parent/Carer Forum.

5.2 DfE work on Creating a Sustainable High Needs System

5.2.1 LA officers met with the ESFA in the summer and will be meeting with the ESFA this term. The London Borough of Waltham Forest has not currently been invited to take part in one of the two formal intervention programmes that the DfE is running: the Safety Valve Programme and the Building Better Value Programme. Details can be found through these links:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1084835/Local_authority_guidance_on_high_needs_sustainability.pdf

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1110657/Sustainable_high_needs_systems_guide_-_SV_and_DBV_updates_-_Oct22.pdf

5.3 Learning from best practise – DfE guidance

5.3.1 The first 20 Local Authorities were invited to take part in the Safety Valve Programme in 2020-21, so there is a wealth of information about what other Local Authorities are doing to address the pressures and some of the challenges they have experienced in this space.

<https://www.gov.uk/government/publications/high-needs-budgets-effective-management-in-local-authorities>

5.3.2 This document makes several recommendations which the service is looking at, as well as some key headlines:

- Developing a stronger and more consistent mainstream SEND offer
- Understanding and influencing parental expectations
- Building capacity for meeting the needs of young people on the autism spectrum
- Supporting phase transfer
- Developing a clearer and broader range of pathways post-16
- Effective commissioning and monitoring of provision
- Improving financial processes and data systems

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1003162/Case_studies_-_Sustainable_high_needs_systems_16July2021.pdf

5.3.3 This document highlights several case studies that relate to the following themes:

- Strategic planning and governance
- Appropriately managing demand for EHC plans
- Early intervention focus
- Increased SEND Support Offer
- EHC plan assessment processes: plan cessation
- Culture Change and work with School Leaders
- Appropriate and thorough provision mapping

5.4 Initial key messages on our work on the DSG Management Plan to date

5.4.1 The key area of focus is the High Needs Block, because of the historic deficit and the current financial year forecasts place at risk a balanced budget. Current rate of growth in EHC plans is at the top end of our forecasting and will not be sustainable into 2022/23.

5.4.2 We are forecasting that the number of children with EHC plans will peak in 2023 at 2929. We are currently scrutinising this analysis. EHC plan growth from 2019 to date is high for our under-5s and 5–11-year-olds. The growth for under-5s has moved from 83 children with EHC plans in 2019 to 394 in 2021. The Early Years Pathway has been introduced, and this currently appears to have stabilised growth and is supporting us to better understand need.

5.4.3 We are also forecasting that plans for young people aged 16-19 and 20-25 will peak next year.

5.4.4 Our three areas of greatest primary need are:

- ASD
 - Speech, language, and communication need
 - Social, emotional, and mental health.
- 5.4.5 The LA has already committed to a deep dive looking at autism. The specification has been reviewed and we are seeking a provider to deliver the project.
- 5.4.6 Other workstreams that are contributing into this plan are:
- SEND Strategic Place Planning
 - Review of short breaks
 - Review of placements, including looking at out of borough placements
- 5.4.7 The Local Authority is currently recruiting to a one-year Improvement Officer role to work with the SEND Service.

HIGH NEEDS PROJECTION APPENDIX A

| Description | Budget 2022-23 Version 3 | Forecast M6 | Variance |
|---|-----------------------------|-------------------|-----------------|
| INCOME | | | |
| Gross Allocation | 49,627,160 | 49,627,160 | |
| Recoupment for Academy and Further Education | -9,349,501 | -9,349,501 | |
| High Needs Supplementary Grant | 1,839,321 | 1,839,321 | |
| TOTAL HIGH NEEDS BLOCK INCOME | 42,116,980 | 42,116,980 | 0 |
| EXPENDITURE | | | |
| LBWF SCHOOLS | | | |
| Special Schools | 10,652,375 | 11,031,134 | |
| Special Resource Provision | 3,168,000 | 3,121,005 | |
| Mainstream Schools | 9,600,000 | 11,762,000 | |
| Hawkswood & Burnside Top up funding | 160,000 | 160,000 | |
| Growth & HNSG Allocations | 2,439,165 | | |
| TOTAL LBWF SCHOOLS | 26,019,540 | 26,074,138 | -54,598 |
| OTHER SCHOOLS | | | |
| Independent and NM Special schools | 2,080,087 | 2,141,164 | |
| Other LA schools | 1,369,469 | 2,139,456 | |
| Alternative Education | 998,367 | 407,138 | |
| Growth & HNSG Allocations | 183,000 | | |
| TOTAL OTHER SCHOOLS | 4,630,923 | 4,687,759 | -56,836 |
| ALTERNATIVE PROVISION | | | |
| College Places | 1,524,700 | 1,410,740 | |
| Family Resilience | 538,000 | 494,047 | |
| New Provisions | 328,333 | 284,500 | |
| Other Items Including Assessment places | 300,000 | 300,000 | |
| TOTAL ALTERNATIVE PROVISION | 2,691,033 | 2,489,287 | 201,747 |
| PRU | | | |
| Place funding | 860,000 | 860,000 | |
| Additional Funding for PRU places(Claw backs and Top ups) | 193,000 | 153,000 | |
| PRU SEND Place funding | 140,000 | 140,000 | |
| Additional SEND place funding at 13k/place | 182,000 | 187,460 | |
| TOTAL PRU | 1,375,000 | 1,340,460 | 34,540 |
| POST 16 PROVISION | | | |
| Top up funding and Spot Purchases | 2,593,452 | 3,000,000 | |
| Growth & HNSG Allocations | 370,000 | | |
| TOTAL POST 16 | 2,963,452 | 3,000,000 | -36,548 |
| CONTRACTS | | | |
| Home Hospital | 264,000 | 287,000 | |
| SEND Success Excluding EY | 652,584 | 670,000 | |
| SEND Success EY | 83,000 | 83,000 | |
| EY Home Visitors - SEND | 108,000 | 108,000 | |
| Speech and Language Therapy | 140,000 | 178,500 | |
| Growth & HNSG Allocations | 35,000 | | |
| TOTAL CONTRACTS | 1,282,584 | 1,326,500 | -43,916 |
| OTHER HN COSTS | | | |
| SEND Service | 176,000 | 246,000 | |
| BACME | 324,100 | 324,100 | |
| FAP | 72,000 | 72,000 | |
| Contribution to Direct Payments | 1,070,800 | 1,047,000 | |
| HN Settings Pay & Pension Allocations | 752,000 | 752,000 | |
| EY Top ups | 550,000 | 868,000 | |
| HN Finance | 60,000 | 60,000 | |
| TOTAL OTHER COSTS | 3,004,900 | 3,369,100 | -364,200 |
| TOTAL HIGH NEEDS BLOCK EXPENDITURE | 41,967,432 | 42,287,244 | -319,812 |
| CONTINGENCIES | 149,548 | 0 | 149,548 |
| HNB TOTAL | 42,116,980 | 42,287,244 | -170,264 |

LONDON BOROUGH OF WALTHAM FOREST

| | | | |
|---|---|-------------|----------|
| Meeting / Date | SCHOOLS FORUM 16 November 2022 | Agenda Item | 8 |
| Report Title | High Needs: Capital Investment | | |
| Decision/ Discussion/ Information | For Information and Discussion | | |
| Report Author/ Contact details | Lindsay Jackson, Assistant Director Post 16 & School Operations lindsay.jackson@walthamforest.gov.uk | | |

1. SUMMARY

This report informs School Forum of the current capital investment for High Needs provisions.

2. RECOMMENDATION

Schools Forum to note:

- 2.1 The contents of this report.

3. REASON

- 3.1 As part of the development of the DSG management plan and for transparency with Schools Forum, the LA is reporting current capital investment programme for High Needs.

4. BACKGROUND

- 4.1 In 2019, Cabinet agreed for £16m to be set aside in the School's Capital budget in recognition of the need for capital investment to implement SEND strategies and arising place needs.
- 4.2 In financial years 2022-23 and 23-24, the DfE provided £6.9m of High Needs Provision Capital allocation for Waltham Forest, which has been used to offset the commitment previously made by the Council.
- 4.3 These allocations have been committed to a variety of projects including:
- Increased AP places via Social Inclusion units and creation of a high dependency and family resilience centre at North Birkbeck Road, Leyton

Music, and construction skills for future employment. The co-location with the Family Resilience Centre will allow close collaboration between staff groups, provide a base for the Youth Offending Service and a base for police working with youth offenders.

6. SPECIAL EDUCATIONAL NEEDS AND DISABILITY PROJECTS

- 6.1 An Analysis of current and forecast need is currently being undertaken to create a SEND Place commissioning plan for Waltham Forest, upon which the capital investment will be based. Within the capital budget the following have been highlighted as likely areas of need:
- 6.2 Expansion of places available for children and young people with significant, specialist needs within special schools. Feasibility work is currently underway to expand Year 1 and Year 2 provision in Brookfield House School by 5 places.
- 6.3 Investment in current and new Specially Resourced Provision in mainstream primary and secondary schools
- 6.4 Further investment accessibility within mainstream schools

LONDON BOROUGH OF WALTHAM FOREST

| | | | |
|---|---|-------------|----------|
| Meeting / Date | SCHOOLS FORUM 16 November 2022 | Agenda Item | 9 |
| Report Title | High Needs: Support for Inclusive Schools | | |
| Decision/ Discussion/ Information | For Information and Discussion | | |
| Report Author/ Contact details | Duncan James-Pike, Strategic Finance Advisor, duncan.james-pike@walthamforest.gov.uk | | |
| Appendices | Appendix A: Schools and number of EHCPs Appendix B: Options for allocating financial support | | |

1. SUMMARY

This report sets out the outcomes of the Inclusive Schools Task and Finish Group and issues for further consideration.

2. RECOMMENDATION

Schools Forum to note:

- 2.1 The outcomes of the Inclusive Schools Task and Finish Group and that there are several issues to be considered further before any proposals to implement the proposed additional support are taken forward.

3. REASON

- 3.1 It is apparent that there is a wide range on inclusivity in Waltham Forest schools as measured by the percentage of pupils with EHCPs. The national average in 2021/22 was 4%: the percentage of all pupils in England with an education, health and care (EHC) plan, 2021/22. This includes all state-funded nursery, primary, secondary and special schools, non-maintained special schools, pupil referral units and independent schools.

(source: <https://explore-education-statistics.service.gov.uk/find-statistics/special-educational-needs-in-england/2021-22>)

- 3.2 Appendix A shows a snapshot of EHCPs in May 2022 to demonstrate this wide range and illustrates some of the financial impact on the most

inclusive schools of having an above average number of pupils with EHCPs.

4. BACKGROUND

- 4.1 Using this measure on inclusion, the most inclusive school is using almost all its notional budget on contributing the first £6,000 of each EHCP leaving very little notional resource to support pupils on SEN Support. The school is also using over 10% of its school block budget allocation on those.
- 4.2 The LA was interested in whether a scheme could be devised that could recognise and mitigate this extra burden falling on inclusive schools, while recognising that it was not affordable or practical to seek to fully compensate inclusive schools for this burden.
- 4.3 The High needs funding: 2023 to 2024 operational guide (Updated 17 October 2022) permits this approach and states at 12.1 Additional funding for mainstream schools:
- 4.4 “One of the categories of high needs spending referred to above is targeted funding to mainstream schools. Local authorities can provide additional funding outside the main funding formula for mainstream schools and academies on a consistent and fair basis, especially where the number of their pupils with SEND and/or high needs cannot be reflected adequately in the funding they receive through the local funding formula. They should define the circumstances in which additional funding will be provided from their high needs budget....
- 4.5 Additional funding may be provided where there is a disproportionate number of pupils with a particular type of SEND. For example, a primary school may have developed a reputation for meeting the needs of high achieving pupils with autism, or pupils with physical disabilities, and it is not possible to target additional funding to the school through factors in the school funding formula.
- 4.6 Local authorities should have a formula or other method, based on their experience of distributing additional funding to their maintained schools and academies. This should be agreed with schools and described on the APT. In all cases, the distribution methodology should be simple and transparent, and devised so that additional funds are targeted only to a minority of schools which have particular challenges because of their disproportionate number of pupils with SEND or high needs, or their characteristics. Budget and expenditure should be included within the relevant s251 statements”.
- 4.7 The LA ear-marked a budget of £150,000 from the High Needs Supplementary Grant to support these EHCP “Hot Spot” schools and convened a Task and Finish group in July to advise on a suitable methodology to allocate this budget.

- 4.8 The Task and Finish Group met twice and agreed there was a consensus that these inclusive schools should receive some extra support. Areas of agreement included
- Payments should be processed termly: October, January, and May – the first week of each term, based on the register by the LBWF.
 - Nursery schools should be included
 - Not to ask for an inter-block transfer to fund the inclusion budget
 - Using the national average of 4% would help with transparency
- 4.9 The Task and Finish Group considered several allocation options but there was a split in opinion over final two preferred allocations. These are shown in Appendix B with indicative figures based on May 2022 data. This is a snapshot, and it is to be expected that there will be movement with schools exceeding or falling below the threshold at times.
- 4.10 Option A is a weighted per pupil amount and Option C is for a weighted lump sum. Officers prefer Option C for its simplicity.
- 4.11 If the scheme was funded, the budget would be capped, so the illustrated allocations in Appendix B would be reduced if necessary.

5. ISSUES FOR FURTHER CONSIDERATION

- 5.1 The continuing and increasing pressures in the High Needs budget has meant that the scheme is not affordable in 2022-23 within the High Needs Block and is unlikely to be in 2023-34. Although it would be possible to consult schools on whether they would support an inter-block transfer of £150,000 from the Schools Block to the High Needs Block to fund this scheme (estimated as 0.07% of the Schools Block; £3.99 per pupil) the LA considers that more work would need to be done to present a robust business case for the proposed scheme.
- 5.2 While EHCPs have been used in other local authorities rather than SEND support as a measurement of inclusion for additional support, there is still some debate about whether the number of EHCPs reflects successful inclusion practices and might provide perverse incentives. Even though the sums proposed are modest, there might be an incentive to take one or two additional pupils with EHCPs to reach one of the funding threshold(s).
- 5.3 Further work is also required to demonstrate the extent that a higher number of EHCPs caused a financial burden, for example: What levels of need do the pupils have? Does any clustering of need allow for economies of scale?
- 5.4 These further considerations can be addressed as part of the development of the DSG management plan referenced in Item 7 on this agenda.

Data as of 31.05.2022

| | School | Type | EHCP excl RP | Total NOR | EHCP % |
|----|--|-------------|--------------|-----------|--------|
| 1 | Barn Croft Primary School | Primary | 18 | 217 | 8.29% |
| 2 | Chapel End Junior Academy | Primary | 17 | 289 | 5.88% |
| 3 | Downsell Primary School | Primary | 27 | 465 | 5.81% |
| 4 | Our Lady and St George's Catholic Primary School | Primary | 20 | 387 | 5.17% |
| 5 | Gwyn Jones Primary School | Primary | 21 | 445 | 4.72% |
| 6 | The Jenny Hammond Primary School | Primary | 19 | 404 | 4.70% |
| 7 | Salisbury Manor Primary School | Primary | 14 | 323 | 4.33% |
| 8 | Greenleaf Primary School | Primary | 20 | 473 | 4.23% |
| 9 | Sybourn Primary School | Primary | 24 | 571 | 4.20% |
| 10 | Coppermill Primary School | Primary | 10 | 238 | 4.20% |
| 11 | Hillyfield Primary Academy | Primary | 50 | 1316 | 3.80% |
| 12 | Mayville Primary School | Primary | 14 | 376 | 3.72% |
| 13 | Dawlish Primary School | Primary | 6 | 173 | 3.47% |
| 14 | St Joseph's Catholic Junior School | Primary | 5 | 151 | 3.31% |
| 15 | Oakhill Primary School | Primary | 6 | 186 | 3.23% |
| 16 | Roger Ascham Primary School | Primary | 14 | 440 | 3.18% |
| 17 | Thomas Gamuel Primary School | Primary | 11 | 351 | 3.13% |
| 18 | Whitehall Primary School | Primary | 14 | 452 | 3.10% |
| 19 | Mission Grove Primary School | Primary | 25 | 809 | 3.09% |
| 20 | Stoneydown Park School | Primary | 17 | 570 | 2.98% |
| 21 | Barclay Primary School | Primary | 39 | 1321 | 2.95% |
| 22 | Handsworth Primary School | Primary | 13 | 442 | 2.94% |
| 23 | Buxton School | All-Through | 34 | 1199 | 2.84% |
| 24 | Ainslie Wood Primary School | Primary | 13 | 461 | 2.82% |
| 25 | Henry Maynard Primary School | Primary | 23 | 828 | 2.78% |
| 26 | George Mitchell School | All-Through | 27 | 991 | 2.72% |
| 27 | Whittingham Primary Academy | Primary | 11 | 425 | 2.59% |
| 28 | Willow Brook Primary School Academy | Primary | 16 | 623 | 2.57% |
| 29 | The Woodside Primary Academy | Primary | 31 | 1230 | 2.52% |
| 30 | St Patrick's Catholic Primary School | Primary | 10 | 412 | 2.43% |
| 31 | Parkside Primary School | Primary | 16 | 670 | 2.39% |
| 32 | Longshaw Primary Academy | Primary | 7 | 295 | 2.37% |

| £6K Contribution to EHCP | As a % of Notional SEN Budget | As a % of total SB budget |
|--------------------------|-------------------------------|---------------------------|
| £108,000 | 93.3% | 10.5% |
| £102,000 | 67.2% | 6.3% |
| £162,000 | 78.3% | 6.7% |
| £120,000 | 65.3% | 6.5% |
| £126,000 | 76.2% | 6.5% |
| £114,000 | 55.3% | 5.8% |
| £84,000 | 44.0% | 5.3% |
| £120,000 | 78.8% | 5.9% |
| £144,000 | 53.7% | 5.9% |
| £60,000 | 69.3% | 5.3% |
| £300,000 | 53.3% | 4.8% |
| £84,000 | 54.4% | 4.7% |
| £36,000 | 43.2% | 3.7% |
| £30,000 | 40.0% | 3.5% |
| £36,000 | 40.1% | 3.8% |
| £84,000 | 39.5% | 4.1% |
| £66,000 | 40.5% | 4.1% |
| £84,000 | 41.1% | 4.2% |
| £150,000 | 54.0% | 4.5% |
| £102,000 | 38.9% | 3.8% |
| £234,000 | 41.9% | 4.0% |
| £78,000 | 44.9% | 4.1% |
| £204,000 | 22.8% | 2.8% |
| £78,000 | 40.5% | 3.9% |
| £138,000 | 42.0% | 3.6% |
| £162,000 | 26.5% | 2.7% |
| £66,000 | 36.3% | 3.0% |
| £96,000 | 32.6% | 3.3% |
| £186,000 | 31.6% | 3.4% |
| £60,000 | 31.5% | 3.1% |
| £96,000 | 26.9% | 3.1% |
| £42,000 | 33.7% | 2.8% |

| | School | Type | EHCP excl RP | Total NOR | EHCP % |
|----|---|---------|--------------|-----------|--------|
| 33 | St Mary's Catholic Primary School | Primary | 5 | 214 | 2.34% |
| 34 | Selwyn Primary School | Primary | 16 | 686 | 2.33% |
| 35 | The Winns Primary School | Primary | 14 | 610 | 2.30% |
| 36 | Yardley Primary School | Primary | 11 | 481 | 2.29% |
| 37 | Thorpe Hall Primary School | Primary | 9 | 397 | 2.27% |
| 38 | Riverley Primary School | Primary | 10 | 442 | 2.26% |
| 39 | Chase Lane Primary School | Primary | 15 | 684 | 2.19% |
| 40 | Emmanuel Community School | Primary | 4 | 185 | 2.16% |
| 41 | Chapel End Infant School and Early Years Centre | Primary | 7 | 324 | 2.16% |
| 42 | George Tomlinson Primary School | Primary | 10 | 464 | 2.16% |
| 43 | Walthamstow Primary Academy | Primary | 4 | 187 | 2.14% |
| 44 | Davies Lane Primary School | Primary | 19 | 910 | 2.09% |
| 45 | Chingford CofE Primary School | Primary | 8 | 404 | 1.98% |
| 46 | St Joseph's Catholic Infant School | Primary | 3 | 160 | 1.88% |
| 47 | Newport School | Primary | 14 | 810 | 1.73% |
| 48 | Edinburgh Primary School | Primary | 6 | 356 | 1.69% |
| 49 | St Saviour's Church of England Primary School | Primary | 5 | 323 | 1.55% |
| 50 | St Mary's CofE Primary School | Primary | 8 | 536 | 1.49% |
| 51 | South Grove Primary School | Primary | 7 | 475 | 1.47% |
| 52 | Lime Academy Larkswood | Primary | 7 | 691 | 1.01% |
| 53 | Woodford Green Primary School | Primary | 1 | 229 | 0.44% |

| £6K Contribution to EHCP | As a % of Notional SEN Budget | As a % of total SB budget |
|--------------------------|-------------------------------|---------------------------|
| £30,000 | 32.1% | 2.8% |
| £96,000 | 46.1% | 3.0% |
| £84,000 | 31.5% | 2.9% |
| £66,000 | 42.4% | 3.3% |
| £54,000 | 32.3% | 2.9% |
| £60,000 | 29.4% | 2.7% |
| £90,000 | 28.9% | 2.6% |
| £24,000 | 22.3% | 2.4% |
| £42,000 | 44.6% | 3.4% |
| £60,000 | 30.7% | 2.8% |
| £24,000 | 25.7% | 2.3% |
| £114,000 | 39.1% | 2.9% |
| £48,000 | 28.2% | 2.4% |
| £18,000 | 30.2% | 2.3% |
| £84,000 | 25.8% | 2.3% |
| £36,000 | 19.5% | 1.9% |
| £30,000 | 21.2% | 1.8% |
| £48,000 | 25.3% | 1.8% |
| £42,000 | 20.2% | 1.8% |
| £42,000 | 15.9% | 1.4% |
| £6,000 | 7.1% | 0.6% |

| | School | Type | EHCP excl RP | Total NOR | EHCP % |
|----|------------------------------------|-----------|--------------|-----------|--------|
| 1 | Frederick Bremer School | Secondary | 40 | 880 | 4.55% |
| 2 | South Chingford Foundation School | Secondary | 16 | 506 | 3.16% |
| 3 | Walthamstow Academy | Secondary | 32 | 1096 | 2.92% |
| 4 | Willowfield School | Secondary | 25 | 895 | 2.79% |
| 5 | Heathcote School & Science College | Secondary | 30 | 1077 | 2.79% |
| 6 | Kelmscott School | Secondary | 22 | 898 | 2.45% |
| 7 | Chingford Foundation School | Secondary | 37 | 1538 | 2.41% |
| 8 | Leytonstone School | Secondary | 23 | 960 | 2.40% |
| 9 | Lammas School and Sixth Form | Secondary | 18 | 788 | 2.28% |
| 10 | Norlington School and 6th Form | Secondary | 13 | 761 | 1.71% |
| 11 | Highams Park School | Secondary | 26 | 1545 | 1.68% |
| 12 | Walthamstow School for Girls | Secondary | 13 | 890 | 1.46% |
| 13 | Connaught School for Girls | Secondary | 9 | 620 | 1.45% |
| 14 | Holy Family Catholic School | Secondary | 18 | 1302 | 1.38% |
| 15 | Eden Girls' School Waltham Forest | Secondary | 5 | 610 | 0.82% |
| | | | | | |

| £6K Contribution to EHCP | As a % of Notional SEN Budget | As a % of total SB budget |
|--------------------------|-------------------------------|---------------------------|
| £240,000 | 39.5% | 3.7% |
| £96,000 | 23.5% | 2.6% |
| £192,000 | 28.5% | 3.1% |
| £150,000 | 24.2% | 2.5% |
| £180,000 | 29.0% | 2.8% |
| £132,000 | 23.4% | 2.2% |
| £222,000 | 25.6% | 2.7% |
| £138,000 | 26.0% | 2.2% |
| £108,000 | 22.2% | 2.0% |
| £78,000 | 19.1% | 1.6% |
| £156,000 | 22.8% | 2.1% |
| £78,000 | 15.5% | 1.3% |
| £54,000 | 16.7% | 1.3% |
| £108,000 | 15.3% | 1.6% |
| £30,000 | 7.0% | 0.7% |
| | | |

LONDON BOROUGH OF WALTHAM FOREST

| | | | |
|---|---|-------------|-----------|
| Meeting / Date | SCHOOLS FORUM 16 November 2022 | Agenda Item | 10 |
| Report Title | High Needs: Consultation on Inter Block Transfer | | |
| Decision/ Discussion/ Information | For Information and Discussion | | |
| Report Author/ Contact details | Eve McLoughlin, Head of Early Years, Childcare & Business Development Service Tel: 020 8496 3576 eve.mcloughlin@walthamforest.gov.uk Duncan James-Pike, Strategic Finance Advisor, duncan.james-pike@walthamforest.gov.uk | | |
| Appendices | Appendix A: Indicative impact of proposed Inter Block transfers | | |

1. SUMMARY

This report informs School Forum that the LA intends to consult with schools and academies in the two weeks 21 November to 2 December on a proposal to transfer £350,000 (0.15%) of the Schools Block to the High Needs Block in 2023-24.

2. RECOMMENDATION

Schools Forum to note:

- 2.1 The LA intends to consult with schools and academies in the two weeks 21 November to 2 December on proposals to transfer £350,000 (0.15%) of the Schools Block to the High Needs Block in 2023-24. The total transfer permitted without referral to the DFE would be £1.1 million (0.5%).
- 2.2 This proposal will be consulted on in conjunction with the proposal for an inter-block transfer for MNS rates from the Schools Block to the Early Years Block (see Item 6 on this agenda).

3. REASON

- 3.1 The ESFA is continuing its programme of support for local authorities, supporting them to develop appropriate DSG management plans. The ESFA Local Authority Stakeholder Engagement Team is meeting will all local authorities not included in the Safety Valve and Delivering Best Value programmes (which are designed to support LAs with the highest DSG deficits) and will provide support and challenge through a detailed review of management plans to help them achieve financial sustainability.
- 3.2 The LA continues to develop its DSG management plan, which is required under the DSG grant conditions, as Waltham Forest has an historic deficit and the DSG balances are now in an overall rising deficit (due to the reserves of other blocks reducing due to commitments being funded as planned).
- 3.3 As part of this plan, the LA must consider the limited tools at its disposal, among which is the ability, with Schools Forum support, to transfer some limited funding from the Schools Block to the High Needs Block.

4. BACKGROUND

- 4.1 The current budget forecasts indicate that the High Needs budget is almost balanced for 2022-23, but the margin is small, and that position is fragile. Also, moving forward grant allocations will not support current levels of growth.
- 4.2 The Schools Block is ring-fenced in 2023 to 2024, however local authorities can transfer up to and including 0.5% of their Schools Block funding into another block, with the approval of their Schools Forum. Local Authorities wishing to make a transfer should also consult local maintained schools and academies so that the Schools Forum can take these views into account.
- 4.3 Without Schools Forum agreement, or where they wish to transfer more than 0.5% of their Schools Block funding into one or more other blocks, local authorities must submit a disapplication request to the Secretary of State.
- 4.4 Most proposals by local authorities to move funding from their Schools Block arise because of pressures on their high needs budgets. The department therefore expects to see DSG management plans when authorities are proposing block movement transfers. It is important that the local authority provide details of how the transfer from the Schools Block will decrease the pressure on the High Needs block.
- 4.5 It is particularly important that mainstream schools are clear about how they contribute to the local offer, and how that can affect the need for more specialist provision and the costs that local authorities consequently must meet from their High Needs budgets.
- 4.6 Schools Forum have agreed two transfers from the Schools Block previously: £303,000 in 2020-21 to the High Needs Block as a contribution towards the overall pressures (0.15% of the Schools Block);

and £55,000 in 2022-23 to the Early Years Block to support maintained nursery schools with the cost of their rates.

- 4.7 The LA did not request a transfer from the Schools Block to the High Needs Block 2021-22 or 2022-23 while the impact of the new resource ladder and the reductions changes to the old Resource Ladder for mainstream schools were assessed.
- 4.8 The LA intends to consult with schools and academies in the two weeks 21 November to 2 December on proposals to transfer £350,000 (0.15%) of the Schools Block to the High Needs Block in 2023-24. The total transfer permitted without referral to the DFE would be £1.1 million (0.5%). Schools Forum will be asked to support the proposals at its December meeting.

5. USE OF TRANSFERRED FUNDS: RECEPTION AGE CHILDREN

- 5.1 Unlike the general transfer in 2020-21, it is proposed that the transfer is ring-fenced to a specific project to support Reception age children as set out below.
- 5.2 There are on average between 180 and 200 children in Reception Classes that are on an EHCP, approx. 10% of these are on the lower-level Band 1 and 2 EHCPs.
- 5.3 Post Covid we had originally seen an average increase of 50% in applications for SENIF funding (which supports early years children prior to them taking up their Reception place, without the need for an EHCP) during academic year 2021/22.
- 5.4 This academic year (2022/23) we have seen SENIF applications almost double in September and October 2022. If these children still require additional support by the time they take up their Reception place in September 2023 or Sept 2024 we will see a significant increase in EHCPs being applied for and agreed during these academic years.
- 5.5 SENIF Funding is an established part of the Council's Early Years Inclusion Pathway. This support package provides evidence-based support and interventions that are matched to the child's area of need, and involves specialists, as appropriate, who may be able to identify effective strategies, equipment, programmes, or other interventions to enable the child to make progress towards the desired learning and development outcomes.
- 5.6 As part of this support we review the effectiveness of interventions in enabling the child to make progress; and carry out an assessment to inform the next steps to be taken as part of a graduated approach to support.
- 5.7 This support will also include planning and preparing for transition before the child moves into a school or childcare setting. If, despite having taken relevant and purposeful action to identify, assess and meet the special educational needs of the child as part of the Early Years Inclusion Pathway offer, the child has not made expected

progress, we will consider requesting an Education, Health and Care needs assessment.

- 5.8 Currently SENIF is only offered to pre-Reception age children as it is funded via the EY DSG, and therefore cannot fund support once the child takes up their place and they are funded via the Schools Block of the DSG.
- 5.9 Although we have seen an increase in the number of children who are presenting with additional social/behavioural, communication and language needs it is unclear whether these additional needs are due to the impact of isolation and/or limited support services during the Covid pandemic or on going learning and developmental delay that will continue post EYFS.
- 5.10 In order to address this we would like to run a pilot during 2023-24 that would allow:
 - The extension of SENIF funding to approx. 30 children (estimated number of children that would have otherwise been on EHCP band 1 or 2) for the duration of their Reception year from when they start in September 2023.
 - Provision of in-year support from April 2023 for children currently in Reception who were in receipt of higher level SENIF prior to taking up their Reception place but do not currently have an EHCP
- 5.11 SENIF funding would be at the same level as an equivalent EHCP.
- 5.12 The pilot would allow schools to provide additional support and carry out regular observations to gain a better understanding of the child's needs and enable a more accurate assessment of the child's needs. This going observation and assessment would support more accurate assessment of the support and interventions required as part of any EHCP should one be requested/approved later. The cost of this pilot is estimated at £350k per annum.

INDICATIVE BASE LINE BUDGETS ONLY. These are a roll-forward from 2022-23 using October 2021 census data and have not been adjusted for any changes in pupil numbers or pupil characteristics or other factors such as the change on MFG.

| | |
|-------|-------|
| 0.02% | 0.15% |
|-------|-------|

| School Name | 23-24 Estimate (Baseline with NFF uplift) | £1.47 (For MNS Rates) PER PUPIL | £9.31 (For Reception Age Pupils) PER PUPIL | TOTAL of the 2 Proposed Block Transfers £ | TOTAL of the 2 Proposed Block Transfers % of INDICATIVE Budget Share |
|--|---|---------------------------------|--|---|--|
| | £226,137,176 | £55,287 | £350,149 | £405,436 | 0.18% |
| Chase Lane Primary School | £3,584,352.95 | £915.81 | £5,800.13 | £6,715.94 | 0.19% |
| Whitehall Primary School | £2,137,421.19 | £604.17 | £3,826.41 | £4,430.58 | 0.21% |
| Downsell Primary School | £2,513,255.38 | £583.59 | £3,696.07 | £4,279.66 | 0.17% |
| Newport School | £3,788,786.56 | £1,111.32 | £7,038.36 | £8,149.68 | 0.22% |
| Chapel End Infant School and Early Years | £1,342,818.46 | £323.40 | £2,048.20 | £2,371.60 | 0.18% |
| Edinburgh Primary School | £2,008,178.30 | £530.67 | £3,360.91 | £3,891.58 | 0.19% |
| Greenleaf Primary School | £2,110,860.35 | £605.64 | £3,835.72 | £4,441.36 | 0.21% |
| Handsworth Primary School | £2,015,926.64 | £611.52 | £3,872.96 | £4,484.48 | 0.22% |
| Thorpe Hall Primary School | £1,958,220.23 | £536.55 | £3,398.15 | £3,934.70 | 0.20% |
| The Winns Primary School | £2,961,667.54 | £824.67 | £5,222.91 | £6,047.58 | 0.20% |
| Oakhill Primary School | £995,051.90 | £269.01 | £1,703.73 | £1,972.74 | 0.20% |
| Henry Maynard Primary School | £3,926,816.08 | £1,162.77 | £7,364.21 | £8,526.98 | 0.22% |
| South Grove Primary School | £2,500,417.69 | £617.40 | £3,910.20 | £4,527.60 | 0.18% |
| Dawlish Primary School | £1,003,988.58 | £258.72 | £1,638.56 | £1,897.28 | 0.19% |
| Gwyn Jones Primary School | £2,027,541.86 | £593.88 | £3,761.24 | £4,355.12 | 0.21% |
| George Tomlinson Primary School | £2,261,032.80 | £630.63 | £3,993.99 | £4,624.62 | 0.20% |
| Mission Grove Primary School | £3,532,702.49 | £1,002.54 | £6,349.42 | £7,351.96 | 0.21% |
| Coppermill Primary School | £1,199,244.51 | £321.93 | £2,038.89 | £2,360.82 | 0.20% |
| Stoneydown Park School | £2,827,799.12 | £793.80 | £5,027.40 | £5,821.20 | 0.21% |
| Parkside Primary School | £3,216,959.08 | £898.17 | £5,688.41 | £6,586.58 | 0.20% |
| The Jenny Hammond Primary School | £2,062,713.18 | £588.00 | £3,724.00 | £4,312.00 | 0.21% |
| Ainslie Wood Primary School | £2,090,758.56 | £589.47 | £3,733.31 | £4,322.78 | 0.21% |
| Barn Croft Primary School | £1,091,635.47 | £282.24 | £1,787.52 | £2,069.76 | 0.19% |
| Chingford CoFe Primary School | £2,022,635.44 | £602.70 | £3,817.10 | £4,419.80 | 0.22% |
| St Mary's Catholic Primary School | £1,066,899.27 | £313.11 | £1,983.03 | £2,296.14 | 0.22% |
| St Joseph's Catholic Junior School | £884,798.43 | £233.73 | £1,480.29 | £1,714.02 | 0.19% |
| St Joseph's Catholic Infant School | £785,326.02 | £191.10 | £1,210.30 | £1,401.40 | 0.18% |
| Our Lady and St George's Catholic Pri | £1,823,577.84 | £510.09 | £3,230.57 | £3,740.66 | 0.21% |
| St Patrick's Catholic Primary School | £1,904,661.07 | £539.49 | £3,416.77 | £3,956.26 | 0.21% |
| Frederick Bremer School | £6,903,974.72 | £1,287.72 | £8,155.56 | £9,443.28 | 0.14% |
| Heathcote School & Science College | £6,820,040.23 | £1,302.42 | £8,248.66 | £9,551.08 | 0.14% |
| Willowfield School | £6,505,804.03 | £1,325.94 | £8,397.62 | £9,723.56 | 0.15% |
| Leytonstone School | £6,723,335.10 | £1,424.43 | £9,021.39 | £10,445.82 | 0.16% |
| Walthamstow School for Girls | £6,273,252.24 | £1,315.65 | £8,332.45 | £9,648.10 | 0.15% |
| Kelmscott School | £6,392,591.25 | £1,284.78 | £8,136.94 | £9,421.72 | 0.15% |
| Holy Family Catholic School | £7,030,705.71 | £1,461.18 | £9,254.14 | £10,715.32 | 0.15% |
| Buxton School | £7,691,112.82 | £1,746.36 | £11,060.28 | £12,806.64 | 0.17% |
| Lime Academy Larkwood | £3,170,736.11 | £857.01 | £5,427.73 | £6,284.74 | 0.20% |
| Yardley Primary School | £2,028,418.93 | £612.99 | £3,882.27 | £4,495.26 | 0.22% |
| Davies Lane Primary School | £4,020,074.65 | £1,203.93 | £7,624.89 | £8,828.82 | 0.22% |
| Hillyfield Primary Academy | £6,504,682.52 | £1,816.92 | £11,507.16 | £13,324.08 | 0.20% |
| Emmanuel Community School | £1,051,519.69 | £273.42 | £1,731.66 | £2,005.08 | 0.19% |
| Willow Brook Primary School Academ | £3,037,431.54 | £834.96 | £5,288.08 | £6,123.04 | 0.20% |
| The Woodside Primary Academy | £5,622,580.67 | £1,542.03 | £9,766.19 | £11,308.22 | 0.20% |
| Chapel End Junior Academy | £1,692,793.55 | £427.77 | £2,709.21 | £3,136.98 | 0.19% |
| Riverley Primary School | £2,337,703.21 | £595.35 | £3,770.55 | £4,365.90 | 0.19% |
| Sybourn Primary School | £2,523,877.77 | £699.72 | £4,431.56 | £5,131.28 | 0.20% |
| Thomas Gamuel Primary School | £1,645,519.32 | £438.06 | £2,774.38 | £3,212.44 | 0.20% |
| Walthamstow Primary Academy | £1,084,366.32 | £276.36 | £1,750.28 | £2,026.64 | 0.19% |
| Roger Ascham Primary School | £2,112,751.51 | £574.77 | £3,640.21 | £4,214.98 | 0.20% |
| Longshaw Primary Academy | £1,495,256.92 | £416.01 | £2,634.73 | £3,050.74 | 0.20% |
| Salisbury Manor Primary School | £1,628,682.99 | £432.18 | £2,737.14 | £3,169.32 | 0.19% |
| Woodford Green Primary School | £1,010,680.13 | £286.65 | £1,815.45 | £2,102.10 | 0.21% |
| Whittingham Primary Academy | £2,042,119.48 | £567.42 | £3,593.66 | £4,161.08 | 0.20% |
| Mayville Primary School | £1,850,861.38 | £507.15 | £3,211.95 | £3,719.10 | 0.20% |
| St Saviour's Church of England Prima | £1,714,353.20 | £482.16 | £3,053.68 | £3,535.84 | 0.21% |
| St Mary's CoFe Primary School | £2,574,868.13 | £795.27 | £5,036.71 | £5,831.98 | 0.23% |
| Barclay Primary School | £6,096,346.40 | £1,741.95 | £11,032.35 | £12,774.30 | 0.21% |
| Selwyn Primary School | £3,044,658.46 | £877.59 | £5,558.07 | £6,435.66 | 0.21% |
| South Chingford Foundation School | £3,770,443.39 | £758.52 | £4,803.96 | £5,562.48 | 0.15% |
| Eden Girls' School Waltham Forest | £4,433,670.32 | £896.70 | £5,679.10 | £6,575.80 | 0.15% |
| Connaught School for Girls | £4,231,181.89 | £906.99 | £5,744.27 | £6,651.26 | 0.16% |
| Norlington School and 6th Form | £5,049,699.00 | £1,015.77 | £6,433.21 | £7,448.98 | 0.15% |
| Lammas School and Sixth Form | £5,593,607.17 | £981.96 | £6,219.08 | £7,201.04 | 0.13% |
| Highams Park School | £7,785,055.40 | £1,727.25 | £10,939.25 | £12,666.50 | 0.16% |
| Chingford Foundation School | £8,467,122.47 | £1,850.73 | £11,721.29 | £13,572.02 | 0.16% |
| Walthamstow Academy | £6,398,903.49 | £1,305.36 | £8,267.28 | £9,572.64 | 0.15% |
| George Mitchell School | £6,130,346.72 | £1,389.15 | £8,797.95 | £10,187.10 | 0.17% |