

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 October 2024, 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
Katie Jennings	Mission Grove 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)	
Rebecca Linden	Willowfield School
Jenny Smith	Frederick Bremer School
Secondary Academies and Secondary Free Schools Representatives (4)	
Rob Mammen	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)	
Shona Ramsey	Leytonstone School
Maintained Special School Representative (1)	
Bruce Roberts	Belmont Park School
Special School and Special Academies Representative (1)	
Jo Conduit	Flourish Learning Trust (Joseph Clark, Whitefield)
PRU (1)	
Liz Rattue	Hawkswood Group
Non School Members (4)	
Hannah McCarty (First Stepping Stones Nursery)	Early Years Providers

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Abena Rodman-Tay (Waltham Forest College)	16-19 Providers
Paul Phillips (NEU)	Trade Unions
Carolyn Laws (Holy Family)	Diocesan

AGENDA

Agenda Item	Report Name	Report Authors
1	Welcome all and Apologies. <i>Welcome new members:</i>	Chair
2	Declarations of Interest	All
3	Minutes of meeting 18 September 2024	Chair
3a	Decision Sheet from 18 September 2024	For the record
4	High Needs Block update	Cheryl Eyre
	Date of Next Meetings: Wednesdays, 5:30pm	
	<ul style="list-style-type: none"> 13 November 2024 	Local Funding Formula 2025-26 Report back from Alternative provision Task & Finish Group Maintained Nursery Schools Business Rates Early Years Task and Finish group report High Needs Consultation on Inter block Transfer
	<ul style="list-style-type: none"> 11 December 2024 	Services to Maintained

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		Schools 2025-26 Central Schools Services block 2025-26 Growth Fund and Falling Rolls Fund Inter Block Transfer: Schools Block to High Needs Block
	<ul style="list-style-type: none"> 15 January 2025 	TBC
	<ul style="list-style-type: none"> 05 February 2025 	Early Years Block Indicative allocations Update on Early Years SENIF Schools Block Indicative allocations High Needs Block Indicative allocations Task & Finish Group: High Needs Management Plan



DRAFT MINUTES OF SCHOOLS FORUM MEETING

Wednesday 18 September 2024

Day/Date/Time	Venue
Weds 18 September 2024, 5.30 pm	VIA TEAMS
Contact:	
Clerk to Schools Forum	Dennese.white@walthamforest.gov.uk
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Shona Ramsay	Leytonstone School
Maintained Special School Representative (1)	
Special School and Special Academies Representative (1)	
Jo Conduit	Flourish Learning Trust (Joseph Clark, Whitefield)
PRU (1)	
Liz Rattue	Hawkswood Group
Non School Members (4)	

Abena Rodman-Tay (Waltham Forest College)	16 -19 Providers
Carolyn Laws (Holy Family))	Diocesan
Officers	
Cheryl Eyre	Director of Education
Cllr Kizzy Gardiner	Councilor
Dennese White	Principal Accountant
Elisha Wilkinson	Deputy Head of Early Years & Childcare
Gurpreet Kataora	Head of School Business Support
Hiran Perera	Principal Accountant
Jamel Mason	Senior Accountant
Kashif Nawaz	Assistant Director for SEND
Lindsay Jackson	Assistant Director Post 16 & Operations
Lucinda Lord	Senior Accountant
Sheilender Pathak	Strategic Finance Advisor, Children & Education
Umut Yeter	Principal Accountant
Vira Yurchenko	Finance Officer
Observers	
Fiona Judge	The Winns School
Mary Wilson	Handsworth School
Mike Thomas	Willowfield School
Sean Egan	Lime Trust
Shermaine Lewis	Frederick Bremer School
Sian (unverified)	
Sohana Qureshi	Greenleaf Primary School
Apologies	

1. Welcome and Apologies

- 1.1 Welcome: Jo Conduit & Rob Mammen
- 1.2 Apologies:

2. Declaration of Interests

- 2.1 No Declaration of Interests highlighted.

3. Minutes of 18 September 2024 Schools Forum meeting

- 3.1 Minutes were agreed.
- 3.2 Matters Arising: None

3a. Decision 18 Sheet from September 2024

Noted for the 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 2023 census.

4.2 **Schools Forum to agree:** That the current balance of School Representation is appropriate to continue for the 2024-25 session.

4.2.1 **To Vote:** Agree – 18, Disagree – 0

4.3 School Forum noted the contents of this report.

4.4 Comment

To ensure the most up to date schools' operational guidance is available, as there has been a change in the criteria, for growth and falling rolls fund.

4.5 Response

Thanks for highlighting the above point, we do receive detailed operational guidance each year for each school block hopefully this will be revised for 2025-26 and we will note the specific change for 2025-26 schools budget setting.

5 Dedicated School Grant Outturn 2023-24

Schools Forum to note:

5.2.1 The cumulative brought forward DSG balance from 2022-23 of **£2.33 million** deficit became a **£0.93 million** deficit by the end of 2023-24. This represents an in-year surplus of **£1.40 million** during 2023-24. The main reasons for this in-year surplus were a **£1.89 million** in-year surplus on the Early Years block partly offset by a **£0.53 million** in-year deficit on the High Needs block. However, it should be noted that a significant amount of this Early Years Block surplus will be "clawed back" by the DfE in 2024-25, following calculation of the final census data for 2023-24.

5.2.2 The High Needs block (HN) overspend in 2023-24 of **£0.53 million** led to a cumulative carry forward deficit on the HN block of **£5.05 million**. This cumulative HN deficit is offset by a cumulative surplus balances on the Early Years Block (**£3.10 million**), the Growth Fund (**£0.43 million**) and Schools Block (**£0.52 million**) to give an overall cumulative DSG deficit of **£0.93 million** at the end of 2023-24.

5.2.3 The accounting practice to record DSG deficits in the Local Authority accounts has been extended by 3 years to end in 2025-26. The DSG deficit does not need to be offset by balances in the LAs revenue accounts from 2020-21 to 2025-26 but have been recorded as **Un-useable Reserves**.

5.2.4 The final settlement of DSG allocation to the Local Authority (LA) for 2023-24, after academy recoupmnt was **£188.34 million**.

5.2.5 In July 2023 the DfE announced one-off additional funding for spend in 2023/24 to support individual schools finding themselves in particular financial difficulties. Of the £20m allocated to Local Authorities to support maintained schools, Waltham Forest was allocated £343,459.83 for targeted support to its maintained schools. Local Authorities were provided with flexibility about how to use this funding and so Waltham Forest used this funding to support the work of the maintained Schools Facing Financial Difficulty programme, which has had significant impact on the financial sustainability of our maintained schools. The DfE has advised there are no plans for similar additional funding in 2024/25.

5.3 School Forum noted the contents of this report.

5.4 **Question**

Schools in financial difficulties were supported by £343k, could you illustrate a little on how the £343k was used?

5.5 **Response**

As most of our maintain schools are aware, the program that is run by my service area led by Gurpreet Kataora has previously been funded from the risk reserves by the Council. Funding that the Council has held to support in schools under risk.

What we have done this year is utilised that additional funding that's come through from the DfE to pay for that that service for the whole year. So, every single maintained school receives an element of support from the service. The schools in significant difficulty due to their finances have additional support that is provided on a one-to-one basis.

A small element of the funding was provided to George Tomlinson. And the rest of the funding was safely utilised for the service and Access budgets, which is also provided to our maintained schools.

That budget was, as you've highlighted Helen specifically for our maintain schools and has been used for the for maintained schools.

FY22/23 - EBE team paid from council budget - top 5 schools within the SFFC programme saw reduction in forecast deficit of £2.7m.

FY23/24 - EBE team paid for via the DfE grant - working with 16 schools within the SFFC programme saw reduction in forecast deficit of £1.3m.

x

5.6 **Question**

Has the work that's been done to support the schools led to schools that were in deficit now coming out of deficit? Can you tell us if the number of schools in deficit has reduced or have different schools gone into deficit or whatever?

5.7 **Response**

The impact of the service is very, very tightly monitored over the years since it started in 2018.

The financial impact has been significant in terms of reducing risk to individual schools and also across the system.

We know and are very aware that we don't work with academies, but I know that academies are under just the same level of stress and strain as our maintained schools. What we're seeing is that schools, most schools moving out of the financial pressure once we've been working with them for one to two years, but

however, other schools move in.

We are currently working with, I think 19 schools.

Some of these schools are in direct deficit, with a deficit at the end of last year.

Other schools are reporting a forecast for this year of an in-year deficit, so we work with those schools as well to try to stop them falling into deficit.

The pressures as you are aware is shown across the whole space. The service is showing significant impact year after year of the work Gurpreet, the team and I are doing in those individual schools.

This information was recently reported to PLM of which councilor Gardner chairs.

6 AOB

7 Chair

Thank you to the officials who presented today, we are very grateful for all your hard work.

Thank you and see you next month.

Date of Next Meeting

Wednesday, 16 October 2024, 5:30pm

Schools Forum, 18 September 2024

Summary of Decisions

Item 4 Schools Forum membership and powers

Schools Forum agreed:

- 4.1 That the current balance of school representation is appropriate to continue for the 2024-25 session.

Item 5 Dedicated School Grant Outturn 2023-24

Schools Forum noted:

- 5.1 The cumulative brought forward DSG balance from 2022-23 of **£2.33 million** deficit became a **£0.93 million** deficit by the end of 2023-24. This represents an in-year surplus of **£1.40 million** during 2023-24. The main reasons for this in-year surplus were a **£1.89 million** in-year surplus on the Early Years block partly offset by a **£0.53 million** in-year deficit on the High Needs block. However, it should be noted that a significant amount of this Early Years Block surplus will be “clawed back” by the DfE in 2024-25, following calculation of the final census data for 2023-24.
- 5.2 The High Needs block (HN) overspend in 2023-24 of **£0.53 million** led to a cumulative carry forward deficit on the HN block of **£5.05 million**. This cumulative HN deficit is offset by a cumulative surplus balance on the Early Years Block (**£3.10 million**), the Growth Fund (**£0.43 million**) and Schools Block (**£0.52 million**) to give an overall cumulative DSG deficit of **£0.93 million** at the end of 2023-24.
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- 5.4 The final settlement of DSG allocation to the Local Authority (LA) for 2023-24, after academy recoupment was **£188.34 million**.
- 5.5 In July 2023 the DfE announced one-off additional funding for spend in 2023/24 to support individual schools finding themselves in particular financial difficulties. Of the £20m allocated to Local Authorities to support maintained schools, Waltham Forest was allocated £343,459.83 for targeted support to its maintained schools. Local Authorities were provided with flexibility about how to use this funding and so Waltham Forest used this funding to support the work of the maintained Schools Facing Financial Difficulty programme, which has had significant impact on the financial sustainability of our maintained schools. The DfE has advised there are no plans for similar additional funding in 2024/25.

Schools Forum High Needs DSG

16 October 2024



Progress during 2024

Through significant work on the ongoing migration of SEND data from Mosaic to the Capita ONE system and analysis following the SEND Sufficiency Review we are now working towards updating the revised DSG management plan template.

We have now strengthened our data collection and analysis, which has led us to consider and develop additional plans to address gaps in provision and increasing demand, which has resulted in the increased spend against the HNB. We are now sufficiently informed so that the revised plans are detailed enough to address the key challenges we face; these are predominantly around a lack of early intervention and support at SEN K which leads to continued growth in requests to assess for EHCPs and the lack of local specialist place provision.

The Management Plan is being revised in light of information, trends, data and benchmarking and incorporated into the SEND Transformation Plan and associated workstream.

Initial modelling indicates £28.6m cumulative mitigations needed by 2027/28 to eliminate the deficit and £7.5m reduction in annual spend is required to achieve an in-year balanced budget by 2027/28.

The SEND Transformation Plan has been agreed by the Strategic Transformation Board. The resource to deliver the plan is currently being agreed and the Schools Forum have agreed a working group to work on the development of the early intervention model.



Our modelling of numbers of pupils in different types of provision

We recognise the pressures to place students out of borough due to the high utilisation of in-borough specialist provision. Our providers are open to discussions about potential growth if needed, and we plan to report back on requirements by Spring 2025. The SEND Sufficiency Review has emphasised the importance of aligning our local SEND provision with our SEND Strategy to effectively meet the needs of children and young people. Currently, 18% of children and young people with an EHCP maintained by LBWF are placed out of borough, which represents a significant portion of our SEND population.

In our efforts around SEND Place Commissioning, we are reviewing the local authority's expectations with settings regarding resourced provisions and will be developing robust commissioning models to facilitate these developments. We anticipate growth in a few key areas and are already working on quick wins. The review has led to proposed SEND commissioning recommendations, and we intend to undertake a local area consultation on these.

The demographic shift sees the primary bulge moving into secondary, presenting challenges as physical adjustments do not scale up easily, especially in constrained sites. OAP will be crucial in mitigating this risk. The review has highlighted the need for sufficient education provision for children and young people with SEND as a national and local priority. Our strategy includes reducing the demand for out-of-borough placements. The review findings underscore the necessity for a strategic approach to ensure sufficient placements to meet needs over the medium to long term in the borough. We are committed to developing greater SEND sufficiency for places, improving the availability of appropriate placements closer to the child's home. This will also help reduce the cost of travel assistance.



Assumptions/Notes relating to this initial model

- The model on the next slide is purely an indicative high level forecast intended to provide an idea of the direction of travel based on the latest forecast for 2024/25.
- The model will be updated as the DFE issues more information around future DSG funding allocations and provides more advice around other variables within the model
- The forecasts assume a 2% increase in costs each future year plus a 5% increase in number of EHCPs each year
- The model assumes a 4% increase in HN DSG funding allocation received from the DFE in each future year
- EHCP growth impacts approximately 70% of the HN budget

Draft model of High Needs DSG forecasts – if we do not take action

						<i>Latest forecast as at month 6</i>					
			Outturn	Outturn	Outturn		Year 1	Year 2	Year 3	Year 4	Year 5
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
			(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
		HN DSG spend	37.3	41.9	47.4	53.4	56.4	59.4	62.7	66.1	69.7
		HN DSG funding allocation	37.6	42.1	46.9	48.8	50.8	52.8	54.9	57.1	59.4
		HN DSG in year deficit	(0.3)	(0.2)	0.5	4.6	5.6	6.6	7.8	9.0	10.3
		opening cumulative HN DSG deficit	5.0	4.7	4.5	5.0	9.6	15.2	21.8	29.6	38.6
		closing cumulative HN DSG deficit	4.7	4.5	5.0	9.6	15.2	21.8	29.6	38.6	48.9
		year on year increase in expenditure		4.6	5.5	6.0	3.0	3.0	3.3	3.4	3.6
		year on year increase in HN DSG allocation		4.5	4.8	1.9	2.0	2.0	2.1	2.2	2.3

High Needs DSG Deficit – 2024-25 projections

- 2023/24 in-year deficit on High Needs block DSG block was £0.5m
- Latest forecast for 2024/25 indicates in-year deficit of £4.6m so a £4.1m increase in the "in-year deficit" compared to 2023/24.
- Main reasons for the £4.1m increase are:
 - £2.9m due to lower level of HN DSG funding increase from the DFE in 2024/25; this follows a few years of large funding increases...funding increase in 2023/24 was £4.8m (11%) whereas funding increase for 2024/25 was only £1.9m (4%)
 - £1.2m due to increase in numbers of pupils with complex needs

Our Budget Management Mitigation Plans

The mitigations proposed are predominantly based around:

- Reducing the number of requests to assess for children whose needs can be met outside the statutory framework, by early intervention and support for SEN K through a Locality Panel Model.
- Accurate data modelling of primary need and demand projections linked to commissioning of more cost effective local provision and closer financial management.
- Improving the workforce capacity to support children with SEND or at risk of exclusion, through work around Ordinarily Available Provision, training and development across the local system.

We continue to see risks that are beyond our control around:

- The High Needs Block grant funding not matching continued national rates of growth
- The High Needs Block grant funding not being sufficient to meet national pay awards for teaching and non-teaching staff
- A constrained specialist labour market that reduces our ability to operate in the early help space: e.g. SENCOs, Ed Psychologists and therapeutic roles.
- The statutory override is due to be lifted at the end of 2025/26; if this happens the overall financial risk of the DSG deficit falls on the Council's general fund and could impact on the Council's financial sustainability.

Next steps

- October – information will be shared with Chairs of Schools Forum and agreement on how to take forward and agree members of Working Group.
- SEND Transformation Plan resource and support to be agreed.
- SEND Commissioning team developed
- High Needs Management Group of Schools Forum to be convened to monitor progress against the action plan
- Send latest copy of DSG management plan to DFE by Monday 28 October.
- Council Officers to meet with DFE on 7th November to discuss WF's DSG management plan.
- Consider bringing request for 0.5% transfer from schools block to HN block to November forum.

