

**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 15 January 2025, 5.30pm	VIA TEAMS
<b>Contact:</b>	
<b>Clerk to Schools Forum</b>	<a href="mailto:Dennese.White@walthamforest.gov.uk">Dennese.White@walthamforest.gov.uk</a>
<b>Maintained Primary Headteacher Representatives (5)</b>	
Claire Nairn	Handsworth Primary School
Lindsey Lampard	Chingford C of E Primary School
Rosie McGlynn	Our Lady and St George School
Katie Jennings	Mission Grove Primary School
Zakia Khatun	Whitehall Primary School
<b>Primary Academies and Primary Free Schools Representatives (4)</b>	
Laura Hewer	Lime Trust (Larkswood, Hornbeam)
Anne Powell	Griffin Trust (Riverley, Willow Brook, Lammas)
Maureen Okoye ( <b>Chair</b> )	Arbor Trust (Davies Lane, Selwyn, Woodford Green, Acacia Nursery)
Iram Malik	Genesis Trust (St Marys and St Saviours)
<b>Maintained Primary Governor Representatives (1)</b>	
Aktar Beg	Edinburgh Primary
<b>Nursery School Representative (1)</b>	
Helen Currie	Forest Alliance Nursery Schools (Church Hill, Low Hall)
<b>Maintained Secondary Headteacher Representatives (2)</b>	
Rebecca Linden	Willowfield School
Jenny Smith	Frederick Bremer School
<b>Secondary Academies and Secondary Free Schools Representatives (4)</b>	
Rob Mammen	Chingford Trust (North Chingford and South Chingford)
John Hernandez ( <b>Vice Chair</b> )	Exceptional Education Trust (Norlington School and Sixth Form)
Rob Pittard	Exceptional Education Trust (Norlington School and Sixth Form)
Tracey Penfold	Highams Park Trust
<b>Maintained Secondary Governor Representative (1)</b>	
Shona Ramsay	Leytonstone School
<b>Maintained Special School Representative (1)</b>	
Sean Williams	Belmont Park School
<b>Special School and Special Academies Representative (1)</b>	
Jo Conduit	Flourish Learning Trust (Joseph Clark, Whitefield)
<b>PRU (1)</b>	
Liz Rattue	Hawkswood Group
<b>Non School Members (4)</b>	
Hannah McCarthy (First Stepping Stones Nursery)	Early Years Providers

## Total Membership 25

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

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 11 December 2024	Chair
3a	Decision Sheet from 11 December 2024	For the record
4	Growth and Falling rolls fund	Kevin Smith/Lindsay Jackson
5	School Block Local Funding Formula	Kevin Smith
6	School Improvement de-delegation	Kevin Smith
	<b>Date of Next Meetings:</b> Wednesdays, 5:30pm	
	<ul style="list-style-type: none"> <li>• 05 February 2025</li> </ul>	EY Block Indicative allocations  HNS Block Indicative allocations

## DRAFT MINUTES OF SCHOOLS FORUM MEETING

Wednesday 16 October 2024

Day/Date/Time	Venue
Weds 11 December 2024, 5.30 pm	VIA TEAMS
<b>Contact:</b>	
<b>Clerk to Schools Forum</b>	<a href="mailto:Dennese.white@walthamforest.gov.uk">Dennese.white@walthamforest.gov.uk</a>
<b>Maintained Primary Headteacher Representatives (5)</b>	
Lindsey Lampard	Chingford C of E Primary School
Rosie McGlynn	Our Lady and St George School
Katie Jennings	Mission Grove Primary School
Zakia Khatun	Whitehall Primary School
<b>Primary Academies and Primary Free Schools Representatives (4)</b>	
<b>Maintained Primary Governor Representatives (1)</b>	
Aktar Beg	
<b>Nursery School Representative (1)</b>	
Helen Currie	Forest Alliance Nursery Schools (Church Hill, Low Hall)
<b>Maintained Secondary Headteacher Representatives (2)</b>	
Rebecca Linden	Willowfield School
Jenny Smith	Frederick Bremer
<b>Secondary Academies and Secondary Free Schools Representatives (4)</b>	
John Hernandez (Vice Chair)	Exceptional Education Trust (Norlington School and Sixth Form)
Rob Pittard	Exceptional Education Trust (Norlington School and
Tracey Penfold	Highams Park Trust
<b>Maintained Secondary Governor Representative (1)</b>	
<b>Maintained Special School Representative (1)</b>	
<b>Special School and Special Academies Representative (1)</b>	
Jo Conduit	Flourish Learning Trust (Joseph Clark, Whitefield)
<b>PRU (1)</b>	
Liz Rattue	Hawkswood Group
<b>Non School Members (4)</b>	
Hannah McCarthy	Early Years Provider (First Steppingstones)

Abena Rodman-Tay (Waltham Forest College)	16 -19 Providers
Carolyn Laws (Holy Family)	Diocesan
<b>Officers</b>	
Cheryl Eyre	Director of Education
Coral Miller	Head of Education Finance
Cllr Kizzy Gardiner	Councilor
Dennese White	Principal Accountant
Elisha Wilkinson	Head of Early Years, Childcare, Business Development Team
Gurpreet Kataora	Head of School Business Support
Jamel Mason	Senior Accountant
Kashif Nawaz	Assistant Director for SEND
Kevin Smith	Strategic Finance Advisor, Children & Education
Lindsay Jackson	Assistant Director Post 16 & Operations
<b>Observers</b>	
Fiona Judge	The Winns Primary School
Julie Vazquez	Heathcote Secondary School
Nathalie Fitzgerald	Hawkswood School
Rob Pittard	Exceptional Education Trust (Norlington School and Sixth Form)
Sean Egan	Lime Trust
Sharon Parson	Unverified
Shermaine Lewis	Frederick Bremer School
Sonia	Unverified
Sohana Qureshi	Greenleaf Primary School
<b>Apologies</b>	
Maureen Okoye	Arbor Trust (Davies Lane, Selwyn, Woodford Green, Acacia Nursery)
Shona Ramsay	Leytonstone School

## 1. Welcome and Apologies

- 1.1 Welcome: Hannah McCarthy
- 1.2 Apologies: Maureen Okoye and Shona Ramsay

## 2. Declaration of Interests

- 2.1 No Declaration of Interests highlighted.

## 3. Minutes of 11 December 2024 Schools Forum meeting

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

### 3a. **Decision Sheet from 11 December 2024**

Noted for the record.

## **4 Initial update on the Local Funding Formula 2025-26**

4.1 This report informs the Schools Forum on the proposal to set the Local Funding Formula (LFF) and Minimum Funding Guarantee (MFG). Currently there has not been any announcements by the Department of Education (DFE) on the budget allocations for 2025-26 for the Schools Block and the other educational blocks (High needs, Early years and Central block).

### **4.2.1 Schools Forum to agree:**

4.2.2 To use the NFF factors and rates for setting the budget for 2025-26.

4.2.3 To use the maximum MFG permitted in 2024-25 was -0.5%.

4.2.3 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.

4.2.4 If this upper limit is reached on all factors, any further funds will be applied to the Growth Fund.

### **4.3 Question**

The school block budget only applies to mainstream school not Special schools.

### **4.4 Response**

Yes, the school block budget only applies to mainstream schools.

**4.5 Votes:** 11 agreed; 0 Disregard

## **5 Proposal for a Locality-Based Model to Support Children and Young People with SEND**

5.1.1 This report outlines the proposal for developing and implementing a locality-based model to support children and young people with Special Educational Needs and Disabilities (SEND) in Waltham Forest. The model aims to enhance early identification and support, foster collaboration among professionals, and create a financially sustainable system. The proposal aligns with the Early Help response to SEND, ensuring a cohesive approach to supporting families and children.

5.1.2 The locality based model aims to ensure that pupils thrive at school, feel valued, visible, and supported to be included in their local communities. The aim is to prepare them for a happy, healthy, and productive adulthood by accessing universal, targeted and specialist support/services in their local area without the need for an EHCP where possible.

## **5.2 Comment**

Heads of school are very appreciative of the funding put in by the Local Authority to settle matters, putting programmes in place and recruitment to get reviews done quickly.

## **5.3 Question**

I welcome the spirit of what you said and you've obviously done a great deal of work, and you did mention a second ago, about this capacity issue, which wasn't mentioned as explicitly in the report because from a mainstream perspective, something that would certainly help the efficiency.

Would be more capacity in the special sector, so the pupils are better placed to start with and is that consideration within this paper or is that another piece of work?

## **5.4 Response**

There are two pieces of work aligned.

One is where we are reviewing our school estate to identify sites where there are capacity and secondly that aligns to the work sheet did on sense efficiency and the paper that went to consultation, which so we've built our data knowledge and we have got forecasts we know what's coming through. Therefore, we know what places we will need and the other part of that is we now have got the funding, and we are currently recruiting a commissioning team to bring all those elements together.

### **5.4.1 Response**

Thank you, chair.

In complete agreement with the point that you've raised.

So we are in the process of recruiting to a team of send Commissioners.

This is a new development that has not happened before and we have been successful in securing the resource.

SLT were in absolute agreement with the findings of the sense efficiency review, but also the consultation outcomes as well, which recognises the need to develop our special school estate specifically, but then also the development of

send places when we talk about development of send places in addition to resource provisions and send units alongside with that also developing the send outreach offer across the borough as well.

That's an area which has not been reviewed for a while and there's an opportunity now to absolutely consider this alongside with that, there are a number of other parallel development also taking place in terms of supporting children and young people who are in special school place would be appropriate and we will be working collaboratively with our neighboring boroughs to also identify and we've identified a couple of opportunities in terms of joint working where we can work together and over the over the course of the next calendar year, to begin to see more more of those details coming through.

## **5.5 Question**

An idea something that's been muted before, about a scaled approach.

Is there any consideration in here for the schools, that have such a disproportionate number of pupils with EHCPs and how the resourcing can be used to support those schools?

Because obviously the funding is very much at a pupil base, but when you have 27 pupils in a year group.

There's no economies of scale that you get for such a large number and we're really struggling as many other settings are with just the sheer number coming through.

- 5.5.1 Yeah, one of the thoughts when we were initially devising the locality-based model were routes to funding in terms of how the House, how we can support schools to access short term funding but in an innovative approach. One of the thoughts that has come back from that is actually there are more economies, more benefits to be gained from having a better understanding of what services and support is actually available in a holistic model.
- So when working with other partner services as well at the universal and the targeted tier before we before we enter into that space.
- So that's something that we expect fully to evolve over the pilot phase of this locality based approach. When I mentioned in terms of the send outreach model, that's something which doesn't really exist within Waltham Forest, but we have a long-standing outreach contract with a provider which absolutely has feedback. We had a positive update from flourish outreach services from Alex Dainton at the last SEND Strategic Board, which was very well received. And within that there's also acknowledgement that there's an opportunity to consider the wider needs that have emerged in light of the section 27 consultation that we undertook in the summer as well, which will have an impact on provision.

Just finally and very briefly, for members of schools forum, I'm really pleased. Hearing the feedback that this week we've had really positive engagement, particularly from our secondary school heads and there will be individual letters of acknowledgement going out to leaders in terms of freeing up your staff, engaging with us as part of the phase transfer process for September 2025. Through those conversations, we have already begun to identify perhaps some of the historical challenges that have not been addressed in the way that we would have expected them to that have perhaps now led to some of the challenges that we're experiencing.

I know that does not answer your question in terms of, well, what about the challenges that we are currently experiencing and how we're going to be addressing that going forward.

We are also working with colleagues internally, particularly with Lindsay and her team and learning lessons on what's working well in the schools facing financial challenge space and what lessons can SEND take in, that's already beginning to craft a way forward.

In terms of our financial monitoring and support that we can provide schools, but in a collaborative sense.

So again, we expect for those conversations to mature over the coming weeks internally and in terms of our offer to schools across the borough in the coming months as well.

## **5.6 Question**

Sorry, just a point you were discussing about early earlier intervention and obviously you know that the spirit of that is very welcome, but not all our pupils start in Waltham Forest primary schools, nor do they always show need at a very young age that this could come from a number of different places at different times in life, so it's not just about earlier intervention. Is there any consideration about speedier intervention as well alongside that?

## **5.7 Response**

Our approach, particularly SEND panel and the assessment route for any EHCP to be elevated through this locality based model, because there's something about having a clear understanding of local need and at the moment everything comes straight to SEND panel and there's almost that sort of generic approach and working with Dorothy and the team over the past three months, I believe we're moving in the right direction.

In terms of developing a much more strategic and robust approach towards assessment, I fully accept your point that's absolutely part of our consideration. Early identification by no means does, does that mean that we will not, in terms



of, one of the concerns that's already been raised, is blanket approach? Will there be a blanket approach? No, absolutely not that's not in the spirit of the Code of Practice, nor is it something that we advocating for here either. So we do expect, especially when the OAP toolkits rolled out, established, rolled out and developed over the course of the next two to three school terms, we do expect conversations to take a different direction. And for this particular space that you're leading to for that to be reflected in our approach as well.

## **5.8 Response**

Over years of sitting in school forum, I hear lots of promises and they're never fulfilled.

What I want to reassure colleagues here today is that the send transformation. Project is being scrutinised on a regular basis.

Funding and resources are being put behind it and there is no opportunity for that to fall by the wayside.

I want to reassure everyone everything we've said tonight is in progress, is happening, is funded at this point in time, and it is fully supported by the leader of the Council, the chief exec, the senior leadership team and we have Councillor Gardner on tonight. This has been a major piece of work for the Council and there a major commitment so it is under constant scrutiny. If anything fails, then we will have to find another way around it because we cannot not deliver, so this is a real promise from the Council.

## **5.9 Question**

It's really about place planning, so I'm supporting primary school at the moment that through admissions got 10 EHCP plans in reception and it's unmanageable in a 1FE school.

So I do think we need to work together with admissions and place planning somehow, because that is not fair particularly in smaller schools, they have really tiny budgets, so I think we've got to find a way to move forward so that some schools are not completely overloaded and others seem to have none.

That doesn't seem like the spirit of autonomy to me.

My other point, which is just a really tiny question and I really appreciated the way that Kashif presented that tonight. That was really clear.

And it's just around the language that we use with SEND and SENCO should it be SENCO?

Because my governor has always challenged me on this and my SENCO is also supporting children with disabilities, so I just wondered if there could be a

clarification in our documentation about that language. If SENCO is still fine, it's just a query that I've got really.

### **5.10 Response**

There are two aspects. When you talk about admissions, so admissions sit with the access participation inclusion team led by Lindsay Jackson.

However, they do not do the admissions for children with EHCPs that falls solely with the SEND team. What we have been looking at is how we are joined up to make sure that we collaborate on that, but there's also consideration going forward about a school that has a high number of placed children.

### **5.11 Response**

I'll take both your points.

The first point.

The challenges, particularly around parental preference and for us to support the parent and also the setting, and then no, not necessarily in that order, but those are the challenges that we currently have and what I would recognised is historically we have had a team that perhaps, has not been as fully briefed of the locally available provision and the arrangements that are in place and to be able to have those early conversations with, parents and families.

And what I'm really pleased to share at this stage is over the past four months, we have been actively recruiting and appointing a high caliber of staff to the SEND team and some of the conversations that are now taking place are very, very different with parents.

And in the true spirit of Co production, I do expect to have a positive impact going forward. And I fully take your point in terms of the financial challenges that small settings do experience, particularly with higher volumes of children and young people place there with EHCPs.

I do expect that matter to be addressed over ahead of time. For this period where we are at the moment, it will just be a case of working on a school per case by case basis, but from a strategic perspective, we're now partway through the first phase transfer window and I'm really pleased that we are on track to where we want to be.

We expect all parents to be notified of their options well in advance of the 15th of February 2024 and for schools to be absolutely aware and to be in receipt of the of the EHCPs by the end of January 2024, so that gives a fortnight to be able to work through those details as well.

The Communications will continue to come out and at the start of the spring term I will write to all colleagues and across all of our local areas and partnership again just to reiterate that timeline,

The final point SENCO generally the national term that's used not with the D however, there's nothing that says that you don't include the D but SENCO when you talk about national associations, they would refer to SENCO. But SENCO is not frowned upon and used interchangeably.

## **6 Services for Maintained Schools 2025-2026 (ESG)**

This report requests that maintained schools continue to allow the Local Authority (LA) to retain centrally funding towards the costs of services that maintained schools cannot perform for themselves. These services include preparing annual consolidated accounts and performance information; pensions administration; and health and safety and asset management responsibilities.

### **6.1 School Forum to note:**

- 6.1.1 That there are a number of services that that local authorities have to provide for maintained schools which they cannot perform themselves.
- 6.1.2 Academies are required to perform these functions for themselves or pay their MATs to do so for them.
- 6.1.3 The agreement between maintained schools and the Local Authority in response to the cessation of the Education Services Grant (ESG) that maintained schools would contribute towards the cost of functions that they cannot perform for themselves.
- 6.1.4 If the LA and Schools Forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State.

### **6.2 School forum to agree:**

- 6.2.1 To allow the Local Authority to retain centrally no more than 0.5% of any maintained schools' budget share expressed as a per-pupil amount; with a matching per-place amount applied to the maintained special school and the PRUs in financial year 2025-26.

### **6.3 Question**

Is this for everyone to vote or only mainstream schools?

### **6.3.1 Response**

It is for mainstream schools to vote.

6.4 School Forum noted the contents of this report.

6.5 Votes: 13 Agreed; 0 Disagreed

## **7 Central School Services Block 2025-26**

This report requests that Schools Forum agrees to continue to allocate the Central Schools Services Block available after local authority teachers' pensions grant and copyright licences to: the Admissions service; support to Schools Forum; and the LA's Retained Duties.

### **7.1 School Forum to agree:**

7.1.1 To retain centrally £745,000 from the CSSB in 2025-26 and allocate to the Admissions service.

7.1.2 To retain centrally £37,000 from the CSSB in 2025-26 to provide support to Schools Forum.

7.1.3 To retain centrally the balance of the CSSB in 2025-26 (after the deduction for copyright licences and LA teachers' pensions grant) to support the LA's Retained Duties.

7.2 **Votes; 14 Agreed, 0 Disagreed**

## **8 Early Years Block: Early Years funding formula planning for free education payments for under 2s, 2, 3 and 4 year-olds for 2025-26**

8.1.1 This report sets out the proposed plan for the development of the early years funding formula for free education payments for under 2s, 2, 3 and 4 year-olds for 2025-26

### **8.2 School Forum to note:**

8.2.1 The proposed timeline set out in Table 1 should form the basis of development of the 2025-26 early years funding formula (EYFF).

8.2.2 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 2025-26 Early Years Block funding;

- The wider consultation with all FEEE providers regarding the 2025-26 Early Years Funding Formula (EYFF) for under 2s, 2, 3 and 4 year-olds; and
- The 2025-26 provider EYFF hourly payment rates for under 2s, 2, 3 & 4 year-olds.

8.2.3 The DfE's EYNFF operational guidance states that at least 96% of the Early Years Block funding of the DSG in respect of under two, two and three and four year olds MUST be passed through to providers.

8.3 School Forum noted the content of the report.

## **9 Funding Agreement of commissioned Alternative Provision places 2025-28**

This report feeds back from the Task and Finish group set up to review and provide recommendations on the three-year agreement to cover the period 2025-26 to 2027-28 for mainstream school contributions to commissioned Alternative Provision places.

### **9.1 Schools Forum to agree:**

9.1.1 The principles of the Schools Agreement as outlined in 5.1

9.1.2 Primary schools agreement outlined in 5.6.1

9.1.3 Secondary schools agreement outlined in 5.6.2

### **9.2 School Forum to Note:**

9.2.1 No school can be forced to agree to contribute to the 3-year agreement.

However, schools are asked to note the following:

- the 3 year commission provides financial stability to the borough's PRUs and protects the quality of the service delivered,
- the collective approach to this commission provides financial protection to all mainstream schools by spreading costs across all schools,
- the full cost of the commissioned places must be covered by the schools therefore the per pupil cost will increase should any schools opt out,

9.2.2 Schools who choose not to opt-in to the mainstream school agreement will not be able to access any of the intervention places managed by FAP. Interventions, whilst still being considered and managed via FAP will have to be paid by the school on a spot-purchase basis. The spot-purchase price of intervention places will be charged at the same level as set by the Hawkswood Group for other Local Authorities or schools outside of Waltham Forest.

9.2.3 Secondary schools currently have access, via FAP, to intervention places commissioned within St Raphael, based at Holy Family School, and The Oak,

based at Heathcote School. These commissions end in August 2025. The Task and Finish Group have agreed that these commissions should not be included in the 'core' Schools Agreement outlined in this paper. Secondary Heads will continue to consider any further place needs through the Secondary Heads Group in Spring 2025.

- 9.2.4 Hawkswood Primary, Hawkswood Secondary, and Belmont Park are also commissioned to deliver places for children with EHCPs by the SEND service. These places are managed by the SEND panel and will be reviewed and commissioned as part of the SEND Place Commission.

## **10 Question**

Thank you, Lindsay.

I wondered are their other plans to extend the number of primary places or develop an equivalent of Belmont Park for primary aged children.

So it seems to be with a where the gap is that there's the nurture groups and not necessarily full-time provision for primary children and we're seeing a big spike in the needs of children.

## **11 Response**

Thank you.

In terms of the primary space, there was a number of conversations that happened around the delivery of the Hawkswood primary space, and so there have been some adaptations to the delivery model. However, the key stage 1 Nurture group is sort of follows the national guidance around hours etc.

However, we are also at the moment, I am very aware with the team we are looking at those suspension levels and I agree with you, Lindsay, that I think that's a continuing conversation that I'd like to be having with schools around what type of interventions are needed within the primary space.

So it may not be places that come out of mainstream schools, but it is about how do we support our primaries to really drive down the number of suspensions, because we've got very few, you know, really positive in that we have so few permanent exclusions at our primary level, but we are seeing increases around as well.

We're seeing an ongoing.

It's not an increase in suspensions, it's actually decreased slightly, but there's definitely some data showing that there's some real strains within the primary sector that that will be continued.

I will be continuing to have conversations with primaries about how do we support you in managing those.

## **13 Comment**

I mean I know lots of heads have been involved in this for extended period. I do appreciate the work that Lindsay and her backroom team have done in listening to her in response to an adapt and changing the model, which I think has changed about a dozen times, in especially on the secondary side to make it work.

14 **Votes:** 9.1.1 - 13 Agreed, 0 Disagreed, 9.1.2 – 11 Agreed, 0 Disagreed, 9.1.3 – 12 Agreed, 0 Disagreed

15 School Forum noted the contents of this report.

16 **AOB**

15 **Chair**

Thank you everyone.

Have a wonderful Christmas everybody and have a good break.

**Date of Next Meeting**

Wednesday, 15 January 2025, 5:30pm

## **Schools Forum, 11 December 2024**

### **Summary of Decisions**

#### **4 Initial update on the Local Funding Formula 2025-26**

##### **4.1 Schools Forum to agree:**

4.1.1 To use the NFF factors and rates for setting the budget for 2025-26.

4.1.2 To use the maximum MFG permitted in 2024-25 was +0.5%.

4.1.3 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.

4.1.4 If this upper limit is reached on all factors, any further funds will be applied to the Growth Fund.

#### **5 Proposal for a Locality-Based Model to Support Children and Young People with SEND**

##### **5.1 School Forum to Note:**

5.1.1 Discuss the proposed locality-based model for SEND support.

5.1.2 Provide feedback and recommendations for the implementation plan.

5.1.3 Approve the development of the pilot phase of the locality-based model.

#### **6 Services for Maintained Schools 2025-2026 (ESG)**

##### **6.1 School Forum to note:**

6.1.1 That there are a number of services that that local authorities have to provide for maintained schools which they cannot perform themselves.



6.1.2 Academies are required to perform these functions for themselves or pay their MATs to do so for them.

6.1.3 The agreement between maintained schools and the Local Authority in response to the cessation of the Education Services Grant (ESG) that maintained schools would contribute towards the cost of functions that they cannot perform for themselves.

6.1.4 If the LA and Schools Forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State.

## **6.2 School forum to agree:**

6.2.1 To allow the Local Authority to retain centrally no more than 0.5% of any maintained schools' budget share expressed as a per-pupil amount; with a matching per-place amount applied to the maintained special school and the PRUs in financial year 2025-26.

## **7 Central School Services Block 2025-26**

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7.1.1 To retain centrally £745,000 from the CSSB in 2025-26 and allocate to the Admissions service.

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7.1.3 To retain centrally the balance of the CSSB in 2025-26 (after the deduction for copyright licences and LA teachers' pensions grant) to support the LA's Retained Duties.

## **8 Early Years Block: Early Years funding formula planning for free education payments for under 2s, 2, 3 and 4 year-olds for 2025-26**

## **8.1 School Forum to note:**

- 8.1.1 The proposed timeline set out in Table 1 should form the basis of development of the 2025-26 early years funding formula (EYFF).
- 8.1.2 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 2025-26 Early Years Block funding;
  - The wider consultation with all FEEE providers regarding the 2025-26 Early Years Funding Formula (EYFF) for under 2s, 2, 3 and 4 year-olds; and
  - The 2025-26 provider EYFF hourly payment rates for under 2s, 2, 3 & 4 year-olds.
- 8.1.3 The DfE's EYNFF operational guidance states that at least 96% of the Early Years Block funding of the DSG in respect of under two, two and three and four year olds MUST be passed through to providers.

## **9 Funding Agreement of commissioned Alternative Provision places 2025-28**

### **9.1 Schools Forum to agree:**

- 9.1.1 The principles of the Schools Agreement as outlined in 5.1
- 9.1.2 Primary schools agreement outlined in 5.6.1
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### **9.2 School Forum to Note:**

- 9.2.1 No school can be forced to agree to contribute to the 3-year agreement. However, schools are asked to note the following:

- the 3 year commission provides financial stability to the borough's PRUs and protects the quality of the service delivered,
- the collective approach to this commission provides financial protection to all mainstream schools by spreading costs across all schools,
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9.2.2 Schools who choose not to opt-in to the mainstream school agreement will not be able to access any of the intervention places managed by FAP.

Interventions, whilst still being considered and managed via FAP will have to be paid by the school on a spot-purchase basis. The spot-purchase price of intervention places will be charged at the same level as set by the Hawkswood Group for other Local Authorities or schools outside of Waltham Forest.

9.2.3 Secondary schools currently have access, via FAP, to intervention places commissioned within St Raphael, based at Holy Family School, and The Oak, based at Heathcote School. These commissions end in August 2025. The Task and Finish Group have agreed that these commissions should not be included in the 'core' Schools Agreement outlined in this paper. Secondary Heads will continue to consider any further place needs through the Secondary Heads Group in Spring 2025.

9.2.4 Hawkswood Primary, Hawkswood Secondary, and Belmont Park are also commissioned to deliver places for children with EHCPs by the SEND service. These places are managed by the SEND panel and will be reviewed and commissioned as part of the SEND Place Commission.

Meeting / Date	<b>SCHOOLS FORUM 15 January 2025</b>	Agenda Item	<b>4</b>
Report Title	<b>Growth Fund and Falling Rolls Fund 2025-26</b>		
Decision/Discussion/ Information	For Discussion and Decision by all		
Report Author/ Contact details	Lindsay Jackson, Assistant Director Access, Participation and Inclusion  Kevin Smith, Strategic Financial Adviser Kevin.smith@walthamforest.gov.uk		
Appendix	Appendix A: Growth Fund and Falling Roll criteria		

## 1. SUMMARY

- 1.1** This report sets out the Growth Fund and Falling Roll schemes for mainstream school places and recommends the funding size required to implement the Growth Fund and Falling Roll scheme in 2025-26.
- 1.2** It also highlights the need to develop a funding scheme to support the local schools to expand SEND provision in preparation for the implementation of the SEND Place Plan.

## 2. RECOMMENDATION

### 2.1 Schools Forum to agree:

**2.1.1** To continue to support the implementation of the planned mainstream place growth in both secondary and primary phases using the Growth Fund criteria agreed previously by Schools Forum.

**2.1.2** To continue to support the implementation of the annual review of school rolls using the agreed Falling Rolls Fund criteria to clarify if any schools are eligible for financial support.

**2.2** **Schools Forum to agree** the estimated total funding required from the Growth Fund and Falling Roll fund to implement the ongoing costs of schemes previously approved for growth is £1.134,809m in 2025-26.

**2.3** **Schools Forum to note** that the Growth Fund and Falling Roll fund is made up of the following:

**2.3.1** Forecast carry-forward of £395,706 of Growth Fund from 2024/25.

2.3.2 DfE DSG growth allocation of £597,076 for mainstream for 2025/26.

2.3.3 DSG funding of £142,027 for 2025/26.

2.4 **Schools Forum to note** the provision of a specialist payment to support the expansion of Burnside PRU funded via the High Needs Block.

2.5 **Schools Forum to agree** to the creation of a task and finish group to agree a funding criteria to support local schools to expand SEND provision in preparation for the implementation of the SEND Place Plan.

### **3. REASON**

3.1 Schools Forum decides on the size of the Growth Fund and how it is used. The Growth Fund supports the implementation of planned mainstream place expansion based on the LA's Pupil Place Plan.

3.2 The Growth Fund is currently continuing to support the place expansion schemes previously approved for growth which were implemented to meet the place demand which peaked in Reception in 2016/17. In previous years the Growth Fund was focused on supporting the expansion schemes within the primary phase to meet the place demands. Growth Funding is now focused on supporting the expansions within secondary schools as the place demand moves through secondary phase.

3.3 Whilst the LA implements the planned response to increased place demand in some phases and areas of the borough, it is also proactively working with individual schools to manage falling rolls. This is done through the planned reduction of Published Admission Numbers (PAN) for the main intake years, and in the placement of caps in other year groups where possible.

3.4 The most significant and increasing place demand is held within specialist places for children with Educational, Health and Care plans. The place planning for SEND places sits outside of the mainstream place plan and is not included in the Growth Fund scheme. As the SEND Place Plan is finalised it is recommended that School's Forum agree a criteria to confirm how schools will be supported to expand to deliver new SEND places.

### **4. BACKGROUND**

4.1 [Waltham Forest's Pupil Place Plan 2024-30](#) was published and shared with schools in Autumn 2024. It provides information on Local Authority's statutory duties to provide school places and the best practice guidance provided to them in regard to the proactive and collaborative approach that should be taken to ensuring that the local school place offer meets the needs of communities. The Plan provides detail at a borough level for place demand within mainstream primary and secondary schools to 2030. Further detail is

provided within the Plan on the place demands for each of the 10 primary place planning areas and 3 secondary place planning areas for the next 4 academic years. The Plan is updated with census data on an annual basis.

- 4.2 When expanding schools Waltham Forest follows a 'bulge, bulge, expand' model. This provides two years to test the continued demand for places prior to the school taking a permanent expansion to the Published Admission Number (PAN).
- 4.3 Schools' budgets for a given financial year are determined by the pupil count in the preceding October's school census. The purpose of the Growth Fund is to support schools expanding to meet basic need so that there is adequate funding for the additional new forms that otherwise would not get funded until the following financial year. For maintained schools this funding gap would be from the September of entry through to the end of the financial year in March, with the new form having appeared on the October census and attracting funding for the new financial year in April. For academies, where the lag in funding is longer, the funding gap is from the September of entry through to the end of the academy financial year – the following August.

## **5. Growth Fund - Mainstream Places**

- 5.1 Current Growth Funding is in place to support the implementation of the previously approved plan to meet the place demand which peaked in the primary phase Reception year group in 2016/17. As place demand continues to move through to the secondary phase four secondary schools are receiving Growth Fund in 2025-26. In addition, in 2023 a planned expansion was implemented to meet continued place demand within the primary phase within the north of the borough, the Growth Fund is currently due to support this expansion through to 2030/31.
- 5.2 The criteria previously agreed by Schools Forum is shown in Appendix A. Key features of the Growth Fund scheme criteria are:
  - First-year funding guarantee of 30 pupils
  - Bulge Class Protection
  - Leadership & management
  - Additional funding for Resources
  - KS1 and reception protection from appeals etc
- 5.3 Starting in 2018-19, the LA received specific ear-marked Growth Funding from the ESFA based on historical spend and this had been reducing by 20%

year on year. For 2025-26, the indicative allocation for the Growth Fund is £597,076.

## **6. FALLING ROLLS FUND**

6.1 Local authorities may set aside schools block funding to create a small fund to support schools with falling rolls, where local planning data shows that the surplus places will be needed within the next three financial years.

6.2 Schools Forum updated the criteria for the Falling Roll Fund in 2024-25 to align with changes that had been made to the national regulations.

6.3 The current Falling Roll Fund criteria is included in Appendix A, key features are explained below with updated census dates. Schools will be eligible for Falling Roll Fund support where:

- Numbers on Roll are more than 5% lower in the October 2024 census than the October 2023 census.
- The school is in a place planning area where the vacant places are required, as per the published [Pupil Place Plan 2024-30](#), resulting in the LA not being able to support the school with a reduction to their PAN.
- Numbers on Roll are less than 80% of total Planned Admission Number (PAN)
- Due to regulation change any schools, regardless of their Ofsted grade, can qualify if the above criteria are met (previously regulation only allowed schools to be eligible if they had an Ofsted grade of Good or above).

6.4 These criteria have been set to ensure that funding supports schools with falling rolls in planning areas where places are needed, and the LA cannot not support reductions in PAN. The Falling Roll criteria does not support schools that have vacant places if they have increased their PAN for reasons other than addressing basic need.

6.5 Schools will receive protection for the fall in numbers above the 5% threshold. This will be paid at the current AWPU rate. For example, a school that experienced a drop from of 6.5% will receive AWPU for 1.5% of its previous intake.

## **7. Budget for Growth Fund and Falling Roll Fund in 2025-26**

**7.1** The estimated total funding required to implement the Growth Fund and Falling Roll fund in 2025-26 is £1,134,809. This includes the agreed funding for the five schools currently included in expansion programmes and a contingency of £169,695 to meet any needs arising from the Falling Roll Fund review or emergency bulges.

**7.2** In order to meet this forecast funding need Schools Forum are asked to note the use of: the carry-forward of £395,706 of Growth and Falling Roll Fund from 2024/25, the DfE DSG allocation for growth of £597,076 for mainstream, and agree use of £142,027 from DSG for 2025-26.

**7.3** Growth and Falling Roll Fund Budget 2025/26

	<b>Proposed fund</b>
Growth Fund carry-forward 2024-25	£395,706
DfE DSG Growth allocation 2025-26	£597,076
Schools Block DSG	£142,027
	<b>£1,134,809</b>
	<b>Forecast spend</b>
Growth Fund for 5 expanding schools (Leytonstone School, Norlington School, Willowfield School, Kelmscott School, Yardley Primary School)	£965,133
Contingency for Falling Roll Fund / emergency bulges	£169,695
	<b>£1,134,809</b>

## **8. Specialist place development**

**8.1** Current place demand is increasing for children with EHCPs who require specialist places. The DfE DSG Growth allocation and use of Schools Block DSG for growth supports the development of mainstream school places and cannot be used for specialist provision.

**8.2** The agreed expansion of Burnside School onto the North Birkbeck Road satellite, Leyton site was included in the report to Schools Forum on 11<sup>th</sup> December 2024 named 'Funding Agreement of commissioned Alternative Provision places 2025-28'. The expansion of Burnside seeks to meet the needs of children who have been permanently excluded from mainstream schools or who require short/medium term intervention placements. It also



supports the intention of the SEND service to increase the commission of places for children with EHCPs in in-borough schools through the relocation of intervention places for children without EHCPs from Belmont Park Special School to the expanded provision at Burnside School's new satellite site at North Birkbeck Road. This relocation of AP places is intended to enable negotiations for a potential increase of places for children with EHCPs at Belmont Park Special school.

- 8.3 To support Burnside School prepare for place delivery from the North Birkbeck Road, Leyton site from September 2025 Schools Forum are asked to note the provision of a specialist one-off payment to support Burnside School implement the necessary leadership, management and staff recruitment. It is recommended that a maximum of £150,000 is set aside from the High Needs Block for this purpose for use in 2025-26.
- 8.4 A SEND Place Plan outlining the place demands for children with EHCPs is currently being finalised. A capital programme will be developed to support this as necessary. In order to prepare for this expansion programme it is recommended that Schools Forum set up a task and finish group to agree a funding criteria to support local schools to expand SEND provision. It is recommended that this group meet in the summer term and submit a report to Schools Forum with their recommendations in Autumn 2025.

## **Growth Fund and Falling Rolls Fund schemes 2025-26**

### **SUPPORT WHERE THERE IS MAJOR CAPITAL WORKS**

Where there is a planned expansion of a school by at least 1FE, the local authority will provide additional leadership and management funding. If at any stage the proposal to expand is cancelled the staged payments shall only be paid up to the end of the stage at which the project is stopped.

- Stage 1 During Summer Term of academic year prior to first bulge class. Conditional on the intention for further bulges: £50,000;
- Stage 2 During Summer Term of academic year prior to second bulge class (contingent on the first bulge filling and the second planned bulge being implemented) £50,000;
- Stage 3 During Summer Term of academic year prior to permanent expansion (contingent on agreement and approval of permanent expansion) £50,000.

### **SECONDARY**

#### **Permanent Expansions**

Each new FE will receive a first-year funding guarantee of 30 x KS3 AWPU + 30 x average AEN. For maintained schools this will be at x 7/12 for September to March. An additional £5,000 will be paid for each new FE towards the cost of resources.

#### **Temporary (Bulge Class) Expansions**

Each new form of entry will receive a first-year funding guarantee of 30 x KS3 AWPU+ 30 x average AEN. For maintained schools this will be at x 7/12 for September to March. An additional £5,000 will be paid for each new FE towards the cost of resources.

Years after admission: Where the numbers in a bulge class fall below 25, the Local Authority provide protection up to 15 KS3 AWPU funding for Years 7, 8 and 9 and up to 10 KS4 AWPU for Years 10 and 11

### **PRIMARY**

#### **Permanent Expansions**

Each new FE will receive a first-year funding guarantee of 30 x KS1&2 AWPU + 30 x average AEN. For maintained schools this will be at x 7/12 for September to March. An additional £5,000 will be paid for each new FE towards the cost of resources.

### **Temporary (Bulge Class) Expansions**

Each new form of entry will receive a first-year funding guarantee of 30 x KS1&2 AWPU+ 30 x average AEN. For maintained schools this will be at x 7/12 for September to March. An additional £5,000 will be paid for each new FE towards the cost of resources.

Years after admission: Where the numbers in a bulge class fall below 25, the Local Authority provide protection up to 15 KS1&2 AWPU.

### **Key Stage 1 Class Size**

When a school admits a pupil due to a request by the Local Authority or as the result of an appeal and this takes the number in the reception or Key Stage 1 class to over 30, the Local Authority will meet the cost of an additional teaching assistant to keep the class size at 30 or below. Payments will be made termly in arrears based on submitted evidence of costs incurred by the school.

### **FALLING ROLLS**

Schools may receive support when the following criteria are met:

- Numbers on Roll are less than 80% of total Planned Admission Number (PAN)
- Numbers on Roll are more than 5% lower in the October 2024 census than the October 2023 census
- School is in a planning area where the vacant places are required

These criteria have been set to ensure that funding supports schools with falling rolls in planning areas where places are needed and the LA cannot not support reductions in PAN; and does not support schools that have vacant places as they have increased their PAN for reasons other than addressing basic need.

Schools will receive protection for the fall in numbers above the 5% threshold. This will be paid at the current AWPU rate. For example, a school that experienced a drop from of 6.5% will receive AWPU for 1.5% of its previous intake.

For more information on the Growth fund please see the link below:

[Growth and falling rolls fund guidance: 2025 to 2026 - GOV.UK](#)

Meeting / Date	<b>SCHOOLS FORUM 15<sup>th</sup> January 2025</b>	Agenda Item	<b>5</b>
Report Title	<b>Local Funding Formula 25-26: Indicative Budget Shares</b>		
Decision/Discussion/ Information	For Information		
Report Author/ Contact details	<b>Kevin Smith, Strategic Financial Adviser</b>  <b><u><a href="mailto:Kevin.smith@Walthamforest.gov.uk">Kevin.smith@Walthamforest.gov.uk</a></u></b>		
Appendices	Appendix A: Local Funding Formula 2025-26 Appendix B: Formula Changes from 2025-26		

## 1. INTRODUCTION

1.1 In December 2024, Schools Forum agreed that when the Local Authority set the 2025-26 School Budgets:

- The Local Funding Formula will continue to use National Funding Formula (NFF) factors and rates.
- The Minimum Funding Guarantee (MFG) would be +0.5%.

Due to the updated NFF, the DfE guidance states an allowable MFG range of 0.0% or -0.5%, therefore we cannot apply an uplift of +0.5% and this would also be unaffordable. The Local authority has therefore applied the maximum included within the DfE guidance of 0.0%.

- Any additional funding available after running the formula would be used to increase Basic Entitlement (AWPU).

Due to the level of DSG there is a gap in funding that requires a reduction in Basic Entitlement (AWPU) to balance the budget.

1.2 This report and its appendices show the indicative school budget shares for 2025-26. It details the funding factors used, the basic pupil count and pupil characteristics and the changes in these compared to 2024-25. Subject to validation by the ESFA, officers expect the figures in this report to be the funding formula factors for 2025-26.

## 2. RECOMMENDATIONS

### 2.1 Schools Forum to note:

2.1.1 The contents of this report.

### 3. REASON

- 3.1 The LA is required to consult with Schools Forum regarding any changes to the local funding formula including the method, principles and rules adopted.

### 4. BACKGROUND

- 4.1. For 2025-26, the resources available for allocation through individual schools' budgets total £253.33 million, an increase of £0.26 million (0.10%) on the previous financial year.

The 2024-25 Schools block budget including the 3 grants now included in the 2526 Schools block would have been £253.07. Please see the Table below.

- 4.2 The overall Schools Block resources available are £252.60 million, a net increase of £0.74 million, once the Growth Fund and Falling rolls of £0.74 million has been deducted. This figure will be distributed through the APT and allocated to individual schools.

#### Schools Block 2025/26 Allocation Comparison

	£M 2024/25	£M 2025/26	Variance
DSG update as at November 2024	<u>239.60</u>		
24/25 Teachers Pay Additional Grant (TPAG)	3.87		
24/25 Teachers pension employer contribution additional grant (TPECG)	4.75		
24/25 Core school budget grant (CSBG)	<u>4.85</u>		
	13.47		
Total 24/25 DSG allocation with the additional grants	253.07	253.34	0.27
Deduct Growth Fund/Falling rolls	1.00	0.74	0.26
Other transfers from the block	<u>0.21</u>		<u>0.21</u>
	251.86	252.60	0.74

- 4.3 The National Funding Formula (NFF) has been adopted locally. The Department of Education now give the Local authority the range (minimum and Maximum amounts in each factor that can be used to create the Individual Schools budget. Waltham Forest tried to get as close to the Local Funding formula as possible.
- 4.4 PFI allocations have been uplifted by the RPIX of 2.5% added by the ESFA and this has been passported through to PFI schools.

- 4.5 National Non-Domestic Rates have been funded at current cost.
- 4.6 The ESFA has introduced new compulsory split-site funding criteria into the NFF from 2024/25 comprising basic eligibility and distance eligibility. These changes have been incorporated into the LFF.
- 4.7 Appendix A shows the local funding formula for 2025-26.
- 4.8 A Minimum Funding Guarantee (MFG) of 0.0% has been applied. This changes from 2425 MFG of 0.5%, which is no longer allowed by the DFE.
- 4.9 The total Notional SEN budget has been set at £22.08 million, using the rounded factors agreed by Schools Forum in November 2020. The Notional amount in 2526 is estimated at £23.88 million.
- 4.10 Appendix B shows the Local Funding formula (LFF) for 2526 and 2425 and the variance between both years. The Waltham forest factors has been moved as much as possible to the DFE NFF+ACA (Area Cost Adjustment). The most significant increases are the AWPU, FSM ever6 and the Lump sum.
- 4.11 Changes to Pupil Numbers from the October 2023 census to the October 2024 Census are summarised in the table below.

SCHOOLS	Oct-22	Oct-23	movement Between 2023 to 2022	Oct-24	movement Between 2024 to 2023
	37786	37819	33	37260	-559

- 4.12 Schools Forum has previously agreed clear criteria around use of a Falling Roll Fund, which supports schools who had unexpected falls in PAN or where the LA was unable to support a PAN reduction due to wider capacity needs of the planning area. The criteria have been used by officers to review need each year, with two schools falling into these criteria for financial year 2024-25.
- 4.13 As in previous years, further work and checking needs to be completed before submission of the Local Funding Formula and APT, but this is particularly important this year due to the late receipt of data, information and guidance from the DfE, which was delayed due to the General Election and change of Government. .

## 5. CONSULTATION

- 5.1 The LA has calculated the Local Funding Formula in consultation with maintained schools and academies. Schools Forum is being asked to note the indicative allocation of funding for 2025-26.

APPENDIX A		DfE 2025-26 NFF+ACA		Waltham Forest LFF 2025-26		Variance	
Funding Formula Factors		DfE 2025-26 NFF+ACA		Waltham Forest LFF 2025-26		Variance	
PUPIL-LED FACTORS		PUPIL-LED FACTORS		PUPIL-LED FACTORS		PUPIL-LED FACTORS	
		PRIMARY	SECONDARY	PRIMARY	SECONDARY	PRIMARY	SECONDARY
		PER PUPIL	PER PUPIL	PER PUPIL	PER PUPIL	PER PUPIL	PER PUPIL
BASIC ENTITLEMENT	KS1&2	4167.65		4121.65		-46.00	
	KS3		5873.92		5802.92		-71.00
	KS4		6622.52		6548.52		-74.00
DEPRIVATION	FSM	536.26	536.26	536.26	536.26	0.00	0.00
	FSM Ever 6	1148.35	1684.61	1148.35	1684.61	0.00	0.00
	IDACI F	254.59	368.34	254.59	368.34	0.00	0.00
	IDACI E	308.75	487.51	308.75	487.51	0.00	0.00
	IDACI D	482.09	687.93	482.09	687.93	0.00	0.00
	IDACI C	530.84	752.93	530.84	752.93	0.00	0.00
	IDACI B	563.34	807.1	563.34	807.10	0.00	0.00
	IDACI A	742.09	1029.18	742.09	1,029.18	0.00	0.00
ADDITIONAL EDUCATIONAL NEEDS	LOW PRIOR ATTAINMENT	1272.94	1933.78	1,272.94	1,933.78	0.00	0.00
	EAL	644.59	1727.94	644.59	1,727.94	0.00	0.00
	MOBILITY	1045.43	1500.44	1,045.43	1,500.44	0.00	0.00
<b>SCHOOL-LED FACTORS</b>		<b>SCHOOL-LED FACTORS</b>		<b>SCHOOL-LED FACTORS</b>		<b>SCHOOL-LED FACTORS</b>	
LUMP SUM (Each school)		157194.09	157194.09	157194.09	157194.09	0.00	0.00
RATES							
PFI							
<b>SPLIT-SITES</b>							
Basic Eligibility				58500.9			
Distance Eligibility - Maximum				29250.45			
EXCEPTIONAL CIRCUMSTANCES (Kelmescott)				84500			



**APPENDIX B**

Funding Formula Factors		Waltham Forest LFF 2024-25		Waltham Forest LFF 2025-26		Variance between 25-26 and 24-25			
		PRIMARY PER PUPIL	SECONDARY PER PUPIL	PRIMARY PER PUPIL	SECONDARY PER PUPIL	PRIMARY PER PUPIL	SECONDARY PER PUPIL	PRIMARY % Change	SECONDARY % Change
<b>PUPIL-LED FACTORS</b>									
BASIC ENTITLEMENT	KS1&2	£3,872.00		£ 4,121.65		£ 249.65		6.45%	
	KS3		£5,459.07		£ 5,802.92		£ 343.85		6.30%
	KS4		£6,153.68		£ 6,548.52		£ 394.84		6.42%
DEPRIVATION	FSM	£530.92	£530.92	£ 536.26	£ 536.26	£ 5.34	£ 5.34	1.00%	1.00%
	FSM Ever 6	£888.49	£1,300.22	£ 1,148.35	£ 1,684.61	£ 259.86	£ 384.39	29.25%	29.56%
	IDACI F	£254.63	£368.40	£ 254.59	£ 368.34	-£ 0.04	-£ 0.06	-0.01%	-0.02%
	IDACI E	£308.80	£487.58	£ 308.75	£ 487.51	-£ 0.05	-£ 0.07	-0.02%	-0.02%
	IDACI D	£482.17	£682.62	£ 482.09	£ 687.93	-£ 0.08	£ 5.31	-0.02%	0.78%
	IDACI C	£525.51	£747.63	£ 530.84	£ 752.93	£ 5.33	£ 5.30	1.01%	0.71%
	IDACI B	£558.01	£801.80	£ 563.34	£ 807.10	£ 5.33	£ 5.30	0.95%	0.66%
	IDACI A	£736.79	£1,023.93	£ 742.09	£ 1,029.18	£ 5.30	£ 5.25	0.72%	0.51%
ADDITIONAL EDUCATIONAL NEEDS	LOW PRIOR ATTAINMEN	£1,267.72	£1,923.25	£ 1,272.94	£ 1,933.78	£ 5.22	£ 10.53	0.41%	0.55%
	EAL	£639.28	£1,717.38	£ 644.59	£ 1,727.94	£ 5.31	£ 10.56	0.83%	0.61%
	MOBILITY	£1,040.18	£1,495.26	£ 1,045.43	£ 1,500.44	£ 5.25	£ 5.18	0.50%	0.35%
<b>SCHOOL-LED FACTORS</b>									
LUMP SUM (Each school)		£145,625.09		£ 157,194.09	£ 157,194.09	£ 11,569.00	£ 11,569.00	7.94%	7.36%
RATES		Actual Costs							
PFI		Actual Costs							
<b>SPLIT-SITES</b>									
Basic Eligibility		£58,185.02		£ 58,500.90		£ 315.88			
Distance Eligibility - Maximum		£29,146.69		£ 29,250.45		£ 103.76			
<b>EXCEPTIONAL CIRCUMSTANCES</b>		£84,500.00		£ 84,500.00		£ -			

Meeting / Date	<b>SCHOOLS FORUM 15 January 2025</b>	Agenda Item	<b>6</b>
Report Title	<b>School Improvement De-delegation</b>		
Decision/Discussion/ Information	For Discussion and Decision by Maintained Primary schools, Maintained Secondary schools, the Maintained Special School and the PRUs only		
Report Author/ Contact details	<b>Kevin Smith, Strategic Financial Adviser</b>  <a href="mailto:Kevin.smith@walthamforest.gov.uk">Kevin.smith@walthamforest.gov.uk</a>		
Appendices			

## 1. SUMMARY

- 1.1 This report requests that maintained schools allow the Local Authority (LA) to retain centrally funding towards the costs of school improvement services that had previously been funded by the School Improvement Monitoring and Brokering grant. It follows on from a similar paper, presented by the Director of Learning and Systems Leadership for 2022-23.

## 2. RECOMMENDATIONS

### 2.1 Maintained School members of Schools Forum (primary, secondary, special and PRU) to note:

- 2.1.1 The Department for Education (DfE) reduced the School Improvement Monitoring & Brokering Grant, by 50% in 2022-23 with it being removed entirely in 2023-24.
- 2.1.2 The ESFA confirmed that as the grant was to be phased out, local authorities are able to deduct funding from maintained school budgets to support the costs of this activity instead.

### 2.2 Maintained School members of Schools Forum (primary, secondary, special and PRU) to agree:

- 2.2.1 To allow the Local Authority to retain centrally held funds on an annual basis to enable the local authority to fulfil its duties towards the wider school improvement function, including providing support and interventions for any maintained school falling below an Ofsted categorisation of "Good". This would be a continuation of the agreement in principle from the financial year 2022-23.

2.2.3 To agree to this centrally retained funding to be approximately £160,000 for the financial year and approximately £8.26 per pupil with a matching per-place amount applied to the maintained special school and the PRUs.

### **3. REASON**

3.1 The DfE removed the School Improvement Monitoring & Brokering Grant, entirely in 2023-24. The DfE made provisions within the regulations for the financial year 2022-23 onwards to allow local authorities to fund all their school improvement activity (including all core school improvement activities) via de-delegation from schools' budget shares.

3.2 The LA is proposing that maintained schools de-delegate £160,000.

3.3 Maintained schools members of the Schools Forum: primary, secondary, special and pupil referral units (PRUs), are asked to agree the amount the LA will retain.

3.4 If the LA and Schools Forum are unable to reach a consensus on the amount to be retained by the LA, the matter can be referred to the Secretary of State.

### **4. BACKGROUND**

#### **4.1 The School Improvement Monitoring & Brokering Grant and new arrangements.**

4.1.1 The School Improvement Monitoring & Brokering Grant totalled £174,925 in 2019-20 and £163,603 in 2021-22.

4.1.2 The grant has been allocated to local authorities since September 2017 to allow them to continue to monitor performance of maintained schools, broker school improvement provision, and intervene as appropriate. LAs have predominantly used the grant on early challenge and support in cases of potential underperformance, rather than use of formal intervention powers.

4.1.3 The DfE's rationale for removing the grant and replacing it with a de-delegated budget is that it corresponds with their drive towards a school-led improvement system and will put more decisions about improvement provision to schools into the hands of school leaders (via schools forums).

4.1.4 The rationale articulated by the DfE was that as the beneficiaries of improvement support from councils, the DfE believes it is right that schools contribute to the cost of such support but, in turn, they should have greater influence over the activity undertaken.

4.1.5 The DfE believes that the new arrangements will bring the funding for councils' improvement activity closer into line with the relationship between

individual academies and their Multi Academy Trusts (MATs), which normally top-slice funding to secure improvement support.