

London Borough of Waltham Forest
 SCHOOLS FORUM

Day/Date/Time	Venue
Wednesday 14 January 2026, 5.30 pm	VIA TEAMS
Contact:	
Clerk to Schools Forum	Dennese.White@walthamforest.gov.uk
Maintained Primary Headteacher Representatives (5)	
Claire Nairne	Handsworth Primary School
Nicola Wilson	George Tomlinson Primary School
Sian Balbouti	Gwyn Jones Primary School
Katie Jennings	Mission Grove Primary School
Zakia Khatun	Whitehall Primary School
Primary Academies and Primary Free Schools Representatives (4)	
Sean Egan	Lime Trust (Larkswood, Hornbeam)
Anne Powell	Griffin Trust (Riverley, Willow Brook, Lammas)
Maureen Okoye (Chair)	Arbor Trust (Davies Lane, Selwyn, Woodford Green, Acacia Nursery)
Luke Renwick	Barclay Primary School
Maintained Primary Governor Representatives (1)	
Aktar Beg	Edinburgh Primary School
Nursery School Representative (1)	
Helen Currie	Forest Alliance Nursery Schools (Church Hill, Low Hall)
Maintained Secondary Headteacher Representatives (2)	
Rebecca Linden (Vice Chair)	Willowfield Secondary School
Jenny Smith	Frederick Bremer Secondary School
Secondary Academies and Secondary Free Schools Representatives (4)	
Rob Mammen	Chingford Trust (North Chingford and South Chingford)
Alexander Silk	Connaught School for Girls
Rob Pittard	Exceptional Education Trust (Norlington School and Sixth Form)
Tracey Penfold	Highams Park Trust
Maintained Secondary Governor Representative (1)	
Shona Ramsay	Leytonstone School
Maintained Special School Representative (1)	
Abedah Karim	Belmont Park School
Special School and Special Academies Representative (1)	
Jo Conduit	Learning in Harmony Multi Academy Trust
PRU (1)	
Joe Tousent	Hawkswood Group
Non School Members (4)	
Hannah McCarthy (Footsteps Day Nursery)	Early Years Providers
Abena Rodman-Tay (Waltham Forest)	16-19 Providers

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

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

AGENDA

Agenda Item	Report Name	Report Authors
1	Welcome all and Apologies.	Chair
2	Declarations of Interest	All
3	Minutes of meeting 10 December 2025	Chair
3a	Decision Sheet from 10 December 2025	For the record
4	LBWF Growth fund 2026-27 – To Approve & To Note Appendix A	Pamela Stack
5	Local Funding Formula 2026-27 – To Note Appendix A Appendix B	Pamela Stack
6	Interim Report on Alternative Provision - To Note Appendix A	Mary Jarrett
	Date of Next Meetings: Wednesdays, 5:30pm	
	• 11 February 2026	<ul style="list-style-type: none"> DSG forecast and Final Budget setting Annual Report on High Needs Early Years Block Indicative allocation
	• 8 July 2026	<ul style="list-style-type: none"> Draft Outturn 2025-26 Final Budget 2026-27 Government

Total Membership 25

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

		<p>updates</p> <ul style="list-style-type: none">• Scheme of Financing Schools & Associated Policies• Review of Growth Fund/ Constitution / Membership
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DRAFT MINUTES OF SCHOOL FORUM MEETING

Day/Date/Time	Venue
Wednesday 10 December 2025, 5.30 pm	VIA TEAMS
Contact:	
Clerk to Schools Forum	Dennese.White@walthamforest.gov.uk
Maintained Primary Headteacher Representatives (5)	
Nicola Wilson	George Tomlinson Primary School
Sian Boubalti	Gwyn Jones Primary School
Katie Jennings	Mission Grove Primary School
Primary Academies and Primary Free Schools Representatives (4)	
Sean Egan	Lime Trust (Larkswood, Hornbeam)
Anne Powell	Griffin Trust (Riverley, Willow Brook, Lammes)
Maureen Okoye (Chair)	Arbor Trust (Davies Lane, Selwyn, Woodford Green, Acacia Nursery)
Maintained Primary Governor Representatives (1)	
Nursery School Representative (1)	
Helen Currie	Forest Alliance Nursery Schools (Church Hill, Low Hall)
Maintained Secondary Headteacher Representatives (2)	
Rebecca Linden (Vice Chair)	Willowfield Secondary School
Jenny Smith	Frederick Bremer Secondary School
Secondary Academies and Secondary Free Schools Representatives (4)	
Alexander Silk	Connaught School for Girls
Rob Pittard	Exceptional Education Trust (Norlington School and Sixth Form)
Tracey Penfold	Highams Park Trust
Maintained Secondary Governor Representative (1)	
Shona Ramsay	Leytonstone School
Maintained Special School Representative (1)	
Special School and Special Academies Representative (1)	
Jo Conduit	Learning in Harmony Trust (Joseph Clark, Whitefield)
PRU (1)	
Liz Rattue	Hawkswood Group
Non School Members (4)	
Hannah McCarthy (Footsteps Day Nursery)	Early Years Providers

Paul Phillips (NEU)	Trade Unions
Carolyn Laws (Holy Family)	Diocesan
Officers	
Clare Potter	Director of Disability Enablement Service
Dennese White	Principal Accountant
Elisha Wilkinson	Deputy Head of Early Years & Childcare
Eve McLoughlin	Head of Early Years, Childcare & Business Development
Gurpreet Kataora	Head of School Business Support
Jamel Mason	Senior Accountant
Jordan McDougall	Head of Finance Business Partner – Children & Education
Mary Jarrett	Corporate Director of Education
Natasha Hutchin	Assistant Director Finance Business Partner
Pamela Stack	Finance Business Partner - Education
Vira Yurchenko	Principal Accountant
Umut Yeter	Principal Accountant
Observers	
unverified	Chingford CofE Primary School
A Sabri	Holy Family Catholic School
Cllr Kizzy Gardiner	Councillor
Ellie Green	Edinburgh Primary School
Janice Chaplin	Chapel End Infant School
Michele Brown	Opossumed Schools (Newport, Oakhill, Dawlish & Thorpe Schools)
Shermaine Lewis	Frederick Bremer School
Sohana Qureshi	Greenleaf Primary School
Susan (Unverified)	

1. Welcome and Apologies

- 1.1 Welcome:
- 1.2 Apologies: Abena Rodman-Tay, Claire Nairne, Rob Mammen
- 1.3 Thank you to Liz Rattue who will be retiring on the 31st of December 2025 we thank you for long-standing service as a member to School Forum.

2. Declaration of Interests

- 2.1 No Declaration of Interests highlighted.

3. Minutes of 10 December 2025 Schools Forum meeting

- 3.1 Minutes were agreed.
- 3.2 Matters Arising: Nursery Schools were not referenced in the SEND Sufficiency Plan 2025-30.

3a. Decision Sheet from 10 December 2025

Noted for the record.

4 Dedicated Schools Grant 2025-26 Forecast Outturn

- 4.1 This report updates the School Forum on the Dedicated School Grant (DSG) latest 2025-26 forecast outturn position.

4.2 Schools Forum to Note:

- 4.2.1 The latest DSG funding allocations for 2025-26 and the latest forecast outturn position.
- 4.2.2 The latest update on the statutory override position for DSG deficits.

4.3 School Forum noted the contents of this report.

5 Government Updates and 2026-27 Budget Setting

- 5.1 To provide the Schools Forum with an update on Government announcements relating to the National Funding Formula (NFF) and the Dedicated Schools Grant (DSG)

5.2 Schools Forum to Note:

- 5.2.1 The latest updates on the national funding formula (NFF) and the DSG
- 5.2.2 The results of the draft 2026/27 budget consultation on managing the schools block formula within the funding

5.3 School Forum to Agree:

- 5.3.1 To retain centrally the balance of the CSSB in 2026/27 (after the deduction for copyright licences and LA teachers' pensions, NICs and School Budget Support grants) to support the LA's Retained Duties held for all schools.

5.3.2 To Vote: Agree – 13, Disagree - 0

- 5.3.3 The request for Early Years centrally retained funding for 2026/27.

5.3.4 To Vote: Agree - 14 , Disagree - 0

5.4 Question

This relates to item 5.3 – Are we receiving -2.06% less or your taking -2.06 less?

5.5 Response

We are receiving -2.06% reduction per pupil amount compared to last year, considering the grants which have been rolled in to the APT.

5.6 Comment

Just to confirm this reduction is £6,227.

5.7 Response

Yes, that is correct.

5.8 Question

Is this reduction per pupil or overall allocation?

5.9 Response

This is an overall allocation reduction of £6,227.

5.10 Question

Why was their such a small response to the consultation?

5.11 Response

It was a new approach taken this year to carryout the consultation, the format was not familiar with HOS and so next year more clarity and information will be provided.

5.12 Comment

For next year a similar format will be undertaken as per previous years, where options will be provided and more clarity.

5.13 Question

The Early Years section is usually a separate agenda item, which is usually presented by the Early Years team.

5.14 Response

This is usually presented in the Early Years Annual report in February as part of the DSG, but was agreed with Finance this section of the EY report should be presented in this setting, in that we agree the top slice in advance and then in February we provide the detail around the 3% top slice.

5.15 Response

De-delegation and central expenditure request, play an important role in setting the budgets for 2026/27, having the decisions made early helps in setting the local authority budgets and we know in advance of DSG what is been spent centrally as agreed by school forum.

6 Services for Maintained Schools 2026-27 (ESG)

6.1 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.

6.2 School Forum to Note:

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

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

6.2.3 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.

6.2.4 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.

6.3 School Forum noted the contents of this report.

6.4 School Forum to Agree:

To allow the Local Authority to retain centrally a per pupil amount of £25.00 which will represent 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 2026-27. This would create a budget of approximately £482,400, based on the Autumn 24 Census figures

6.5 To Vote: Agree -9, Disagree – 0

6.6 Question

In appendix A, you have listed the responsibilities that maybe funded for maintained schools, it would be helpful to know whether you will provide all these services or a select few to manage expectations

6.7 Response

We can provide a detail breakdown at the next forum as a lot of these functions have been ongoing for several years such as Finance support and meeting our statutory duties.

6.8 Question

What is the spread of costs? Basically, what percentage the schools are paying in is covered by these areas?

6.9 Response

We can provide a detail breakdown of the responsibilities covered and to confirmed this is capped 0.5%.

6.10 Comment

Appendix A itemisation is quite intensive, so it would be helpful to know the responsibilities covered.

6c School Improvement and Creation of a Waltham Forest Education Partnership

6.1 This report summarises the current position and decisions required to agree funding and strategic direction for school improvement in London Borough of Waltham Forest.

6.1 This report contains outcome of Primary and Secondary votes in favour of creating a Waltham Forest Education partnership building on the existing relationship with Haringey Education Partnership

6.1.1 This report sets out contractual next steps to secure School Improvement delivery for the next 5 years.

6.2 School Forum to Agree:

6.2.1 That Schools Forum endorse the creation of a Waltham Forest Education Partnership for the next 5 years subject to the annual de-delegation vote in accordance with Schools Financial regulations.

- 6.2.2 That the Local Authority and maintained schools undertake a joint procurement exercise to secure a contract with Haringey Education Partnership to develop and deliver a Waltham Forest Education partnership overseen by Schools Forum and the Waltham Forest Strategic Education Partnership Board.
- 6.2.3 That the governance arrangements ensure that all parties work together with clear contractual arrangements to continue to deliver outstanding outcomes for children and young people and to offer consistent and high-quality support to Education leaders and their staff to ensure that Waltham Forest continues to be a Borough which supports and values its teaching staff

6.3 To Vote: Agree – 7, Disagree - 1

6.4 Comment

Only maintained schools to vote.

6.5 Question

Is it only heads of schools of maintained schools can vote or Governors of maintained schools can vote as well?

6.6 Response

Your representation on the forum does not reflect the role in the sector, your membership for the school forum is either maintained or Academy.

6.7 Comment

We have already had the vote about De-delegation and the outcome is included in the paper. The decision is to proceed with the contractual arrangement to secure the resource.

6d Facilities Time De-delegation request 2026-27

- 6.d.1** To give the maintained school members of the Schools Forum the opportunity to agree to de-delegate funding during the 2026/27 financial year for the specific purposes outlined in this report.

6.d.2 School Forum to Agree:

6.2 That maintained **primary** school members approve the de-delegation of £87,469 funding for the Facilities Time for teaching staff. This is calculated by multiplying the number of maintained primary pupils 11,482 by the cost of releasing trade union representatives from the host school

6.2.1 That maintained **secondary** school members approve the de-delegation of £58,708 funding for the Facilities Time for teaching staff. This is calculated by multiplying the number of maintained secondary pupils 7,444 by the cost of releasing trade union representatives from the host school

6.3 To Vote 2.2: Agree - 3, Disagree - 0 & 2.3 – Agree – 5, Disagree - 0

6.3 Comment

As an academy representative I will prefer de-delegation, as a group not sure what everyone else prefers, because it would be easier and smoother going forward. In the past it was Academies and all schools de-delegated.

6.4 Comment

This is for maintained schools only, so we can input through the APT. There will be opportunities for academies to do the traded, through invoicing, which we can look at later.

6.5 Comment

Can we look at what was done previously for academies, so that academies can have de-delegation as well.

Yes, we can look at mechanism, which was setup in previous years for Academies.

6.6 Question

The figure of £762 per pupil, is that based on the assumption that all maintained schools primary & secondary would contribute through the de-delegation and that the total amount needed, to fund facilities time or is it that assuming also all Academies contribute as well?

6.7 Response

This is base only on the maintained schools. It is based on the amount time membership is required. The formulation is certain amount of membership is required, as a certain amount of representation and we break that down in what it means per pupil rate to cover the amount of time covered by union membership.

6.8 Comment

What led to the decision not to de-delegate in the past, was that maintained schools began feeling, they were funding something which was then used by Academies but not funded by Academies and that is clearly unfair and so unless there is a mechanism to ensure academies do contribute funds it will be forever unfair.

6.9 Comment

My understanding this was done only on maintained time and cost. If there are additional needs that academies want to investigate and what the costs would be at the same per pupil rate.

6.10 Comment

If academies want to buy into the union facility time it would be fine. We can create a rate base on there number of pupils, membership and facilities time and break it down per academy.

6.11 Comment

Thank you for the information, because one of the reasons is not about academies, it was about the breakdown of the hours and what the money was paying for. This is clear and concise and answered a lot of questions, in the past we haven't had the answers to.

6.12 Comment

Thank you to officials who presented a very detail report.

7 Early Years Update 2025-26

7.1 The purpose of this report is to provide members of the Schools Forum with an update on the latest duties and participation rates for funded early years education in Waltham Forest as compared to the wider local and national picture and provide information regarding next steps by the Early Years Task and Finish Group in that context.

7.2 School Forum to Note:

- 7.2.1 The work undertaken in relation to Early Years DSG in financial year 2025/26 to date.
- 7.2.2 The principles that the Early Years Task and Finish Group indicated that they would like the funding formula for 2026/27 to be based on.

7.3 School Forum noted the contents of this report.

7.4 Question

The number of children last year with low income that took up the 2-year-old places, there are less in this year, is that because there are less deprived children or because settings are focused on day care?

7.5 Response

It is because the number of children in the local authority that are eligible for 2-year-old, number has significantly decreased over the number of years. It has decrease by around 50% the number of actual children who are eligible and we have been advise by the DWP, the number that are eligible for 2-year-old place. We are still maintaining around 65% of those children actually taken up their place. It does not look on the surface of it that any decrease is because of settings not taken up places, but there are lot more schools taking 2-year-old places than previously, this is positive.

7.6 AOB

7.6.1 Question

The SEND Sufficiency report is brilliant and very detail. My query and I would like it to be amended, if possible, there were two groups on pages 34 and 45 that were noted which are, schools with a nursery or private settings to do with the number of EHCP's and SENIF. Maintained nursery schools fall into neither of those groups but produce very high numbers of EHCP and apply for SENIF funding. I would kindly request that information I am assuming we been grouped in with the maintain schools, but if we could have that information noted within those 2 groups and create a third group because we are neither a school with a nursery or a private provision.

7.6.2 Response

Yes, there are no distinction between maintained nursery schools or nursery classes within a school. We have done some analysis around this; the maintained nursery schools are not taking a disproportionate number of children on SENIF. Only 1 maintained nursery school is in the top 10 in terms of the number of SENIF children that we fund. For the EHCP's 5 is the highest number and 1 been the lowest number any of our early years' settings and 2 of maintained nursery schools are on that higher end form, but not massive in terms of the difference. So, I am not sure it would be an accurate reflection to say that the maintain nursery schools take disproportionate more, but whether we split it and input it in the report as which are maintained nursery schools

and which are school's nursery classes. I will be guided by other colleagues in SEND who wrote the report, whether they want to split it. They are not much of an outlier compared to PVI's and other school nursery base provision.

We will review criteria to see if it can be split as maintained nursery schools does not form part of either setting.

7.6.3 Comment

The data does appear to be in line with the report, but we do have a lot of children.

7.7 Thank you

Thank you to Officials who have prepared and presented very detail reports, we are very grateful.

Thank you to Liz who is retiring and leaving Waltham Forest, we are very grateful for all your hard work and contributions.

Merry Christmas to everyone.

Schools Forum, 10 December 2025

Summary of Decisions

4 Dedicated Schools Grant 2025-26 Forecast Outturn

4.1 Schools Forum to Note:

4.1.2 The latest DSG funding allocations for 2025-26 and the latest forecast outturn position.

4.1.3 The latest update on the statutory override position for DSG deficits.

4.2 School Forum noted contents of this report.

5 Government Updates and 2026-27 Budget Setting

5.1 Schools Forum to Note:

5.1.1 The latest updates on the national funding formula (NFF) and the

5.1.2 The results of the draft 2026/27 budget consultation on managing the schools block formula within the funding

5.2 School Forum noted the contents of this report.

5.3 School Forum to Agree:

5.3.1 To retain centrally the balance of the CSSB in 2026/27 (after the deduction for copyright licences and LA teachers' pensions, NICs and School Budget Support grants) to support the LA's Retained Duties held for all schools.

5.3.2 To Vote: Agree – 13, Disagree – 0

5.3.3 The request for Early Years centrally retained funding for 2026/27.

5.3.4 To Vote: Agree - 14 , Disagree - 0

6 Services for Maintained Schools 2026-27 (ESG)

6.1 School Forum to Note:

6.1.1 That there are a number of services 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.

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6.3 School Forum to Agree:

- 6.3.1 To allow the Local Authority to retain centrally a per pupil amount of £25.00 which will represent 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 2026-27. This would create a budget of approximately £482,400, based on the Autumn 24 Census figures

6.4 To Vote: Agree -9, Disagree – 0

6c School Improvement and Creation of a Waltham Forest Education Partnership.

6.c.1 School Forum to Agree:

- 6.c.2 That Schools Forum endorse the creation of a Waltham Forest Education Partnership for the next 5 years subject to the annual de-delegation vote in accordance with Schools Financial regulations.
- 6.c.3 That the Local Authority and maintained schools undertake a joint procurement exercise to secure a contract with Haringey Education Partnership to develop and deliver a Waltham Forest Education partnership overseen by Schools Forum and the Waltham Forest Strategic Education Partnership Board.
- 6.c.4 That the governance arrangements ensure that all parties work together with clear contractual arrangements to continue to deliver outstanding outcomes for children and young people and to offer consistent and high-quality support to Education leaders and their staff to ensure that Waltham Forest continues to be a Borough which supports and values its teaching staff.

6.c.5 To Vote: Agree – 8, Disagree - 0

6d **Facilities Time De-delegation request 2026-27**

6.d.1 School Forum to Agree:

- 6.d.2** That maintained **primary** school members approve the de-delegation of £87,469 funding for the Facilities Time for teaching staff. This is calculated by multiplying the number of maintained primary pupils 11,482 by the cost of releasing trade union representatives from the host school
- 6.d.3** That maintained **secondary** school members approve the de-delegation of £58,708 funding for the Facilities Time for teaching staff. This is calculated by multiplying the number of maintained secondary pupils 7,444 by the cost of releasing trade union representatives from the host school

6.d.4 To Vote 2.2: Agree - 3, Disagree – 0 & 2.3 – Agree – 5, Disagree - 0

7 Early Years Update 2025-26

7.1 School Forum to Note:

- 7.1.1 The work undertaken in relation to Early Years DSG in financial year 2025/26 to date.
- 7.1.2 The principles that the Early Years Task and Finish Group indicated that they would like the funding formula for 2026/27 to be based on.

7.3 School forum noted the contents of this report.

Meeting / Date	SCHOOLS FORUM 14 January 2026	Agenda Item	4
Report Title	Growth Fund and Falling Rolls Fund 2026/27		
Decision/Discussion/Information	For Discussion and Decision by all		
Report Author/Contact details	Pamela Stack, finance Business Partner Pamela.stack@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 2026/27.

2. RECOMMENDATION

2.1 Schools Forum to approve:

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 approve 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 £982,898 in 2026/27.

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

2.3.1 DfE DSG growth allocation of £461,065 for 2026/27.

2.3.2 DfE DSG falling roles allocation of £614,616 for 2026/27.

2.4 Schools Forum to note that following the annual review of school rolls no schools in Waltham Forest are eligible for financial support using the agreed Falling Rolls fund criteria as set by the DfE.

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 supporting 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.

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

5.1 The growth fund is funded from the schools block. This covers any payments made for schemes meeting the criteria of the LA growth fund (e.g. lump sum, pre -opening and protection funding and weighted pupil adjustments for new and growing schools). There is a specific allocation for growth funding and any shortfall against this allocation becomes a top slice from the rest of the schools block.

5.2 The growth fund can only be used to:

- Support growth in pre -16 pupil numbers to meet basic need
- Support additional classes needed to meet the infant class size regulation
- Meet the costs of new schools

5.3 The growth fund must not be used to support:

- Schools in financial difficulty, any such support for maintained schools should be provided from a de-delegated contingency
- General growth due to popularity, this is managed through lagged funding

5.4 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

5.5 LAs are responsible for funding the growth needs for all schools in their area, for new and existing maintained schools and academies. Local authorities are required to provide growth funding where a school or academy has agreed with the LA to provide an extra class to meet basic need in the area (either as a bulge class or as an ongoing commitment). As a minimum local authorities will have to provide funding to a level which is compliant with the following formula:

$$\text{primary growth factor value (£1,570 2026/27)} \times \text{number of pupils} \times \text{Area Cost Adjustment}$$

For 2026/27 the area cost adjustment for Waltham Forest for the schools block is 1.0829.

5.6 Funding in each of the DSG blocks is ringfenced, therefore any growth funding budgeted for unallocated places which are not then required, is returned to the schools block to be rolled into the funding for the next financial year. However, whilst the DSG is in a deficit overall, any unspent funding goes to an unusable reserve.

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 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 2025 census than the October 2024 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 85% of total Planned Admission Number (PAN)

6.3 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 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.

6.4 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 6.5% will receive AWPU for 1.5% of its previous intake.

6.5 Schools forum are asked to note that following publication of October 2025 census figures, a review of Waltham Forest schools rolls has been undertaken, and no schools meet all 3 criteria for 2026/27.

7. BUDGET FOR GROWTH FUND IN 2026/27

7.1 The estimated total funding required to implement the Growth Fund in 2026/27 is £849,442. This includes the agreed funding for the five schools currently included in expansion programmes and a contingency of £133,456 to meet any needs arising from emergency bulges or requests under the Infant class size legislation.

7.2 In order to meet this forecast funding need Schools Forum are asked to note the use of: DfE DSG allocation for growth of £481,065 and the DfE DSG allocation for falling rolls of £614,616.

7.3 Growth and Falling Roll Fund Budget 2026/27

	Indicative allocations 2026/27
	£
DfE DSG Growth allocation 2026/27	461,065
DfE DSG Falling Rolls allocation 2026/27	614,616
	1,075,681
	Forecast spend
Growth Fund for 4 permanent expansions and 3 bulge classes	849,442
Contingency for emergency bulges /KS1 class size	133,456
	982,898

8. BALANCE OF FUNDS

8.1 Schools Forum are asked to note that as the overall DSG is in deficit the only option for the underspend of £92,783 is to add it to the unusable reserve.

Growth Fund and Falling Rolls Fund schemes 2026-27

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 $30 \times \text{KS3 AWPU} + 30 \times \text{average AEN}$. For maintained schools this will be at $\times 7/12$ 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 $30 \times \text{KS3 AWPU} + 30 \times \text{average AEN}$. For maintained schools this will be at $\times 7/12$ 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 $30 \times \text{KS1&2 AWPU} + 30 \times \text{average AEN}$. For maintained schools this will be at $\times 7/12$ 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.

Infant 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 Infant Class to over 30, the Local Authority will meet the cost of an additional teaching assistant to support the class whilst the size is above 30. 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 85% of total Planned Admission Number (PAN)
- Numbers on Roll are more than 5% lower in the October 2025 census than the October 2024 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 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 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: 2026 to 2027 - GOV.UK](https://www.gov.uk/government/publications/growth-and-falling-rolls-fund-guidance-2026-to-2027)

Meeting / Date	SCHOOLS FORUM 14th January 2026	Agenda Item	5
Report Title	Local Funding Formula 26/27: Indicative Budget Shares		
Decision/Discussion/ Information	For Information		
Report Author/ Contact details	Pamela Stack, Finance Business Partner <u>Pamela.stack@Walthamforest.gov.uk</u>		
Appendices	Appendix A: Local Funding Formula 2026/27 Appendix B: Formula Changes from 2026/27		

1. INTRODUCTION

1.1 In December 2025, Schools Forum agreed that when the Local Authority set the 2026/27 School Budgets:

- The Local Funding Formula will continue to use National Funding Formula (NFF) factors and rates.
- The Minimum Funding Guarantee (MFG) would be 0.0%.
- Any additional funding available after running the formula would be used to increase Basic Entitlement (AWPU).

Due to the level of MFG 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 2026/27. It details the funding factors used, the basic pupil count and pupil characteristics and the changes in these compared to 2025/26. Subject to validation by the ESFA, officers expect the figures in this report to be the funding formula factors for 2026/27.

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 2026/27, the resources available for allocation through individual schools' budgets total £259.37 million, an increase of £6.04 million (2.04%) on the previous financial year.

The 2025/26 Schools block budget including the 2 grants now included in the 26/27 Schools block would have been £260.22 million. Please see the Table below.

4.2 The overall Schools Block resources available are £253.34 million, a net decrease of £1.08 million, once the Growth Fund and Falling rolls of £0.97 million has been deducted. This is due to falling pupil numbers. This figure will be distributed through the APT and allocated to individual schools.

Schools Block 2026/27 Allocation Comparison

	£M	£M	£M
	2025/26	2026/27	Variance
DSG update as at November 2025	253.85	259.37	
2025/26 NICs grant	3.99		
2025/26 SBSG	2.39		
	6.37		
Total 2025/26 DSG allocation with additional grants	260.22	259.37	
Deduct Growth Fund/ Falling rolls	0.74	0.97	0.23
	259.48	258.40	(1.08)

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 4.2% added by the DfE and this has been passported through to PFI schools.

4.5 National Non-Domestic Rates have been calculated according to the DFE indicative amounts.

4.6 The DfE 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 2026/27. A top slice of 0.32% of the Basic Entitlement Factors has been applied to each phase to meet the

demands of the Minimum Funding Guarantee as agreed by Schools Forum in December 2025.

- 4.8 A Minimum Funding Guarantee (MFG) of 0.0% has been applied. This is the same as 2025/26. There are 18 Primary schools and 1 Secondary school that are receiving MFG protection at a total cost of £1.79 million. In 2025/26 40 schools and academies received MFG protection at a total cost of £3.77 million.
- 4.9 From 2020/21 the National Funding Formula (NFF) introduced a mandatory minimum per-pupil funding (MPPF). For 2026/27 the rates increase to at least £5,115 for all primary schools (2025/26 £4,955) and £6,640 for all secondary schools (2025/26 £6,465). In exceptional circumstances LAs have the option to submit a disapplication request to the DfE to not apply the full MPPF values on the grounds of affordability. Waltham Forest does not propose to submit a request to the DfE, and all schools are receiving a per pupil funding amount above this threshold.
- 4.10 The total Notional SEN budget has been set at £24.96 million, using the rounded factors agreed by Schools Forum in November 2020. This is an increase of £0.901 million compared to 2025/26.
- 4.11 Appendix B shows the Local Funding formula (LFF) for 26/27 and 25/26 and the variance between both years. The Waltham Forest factors apart from Basic entitlement (AWPU) mirror the DFE NFF+ACA (Area Cost Adjustment). After rolling in grants, all factors have increased between 1.43% and 2.98%.
- 4.12 Changes to Pupil Numbers from the October 2024 census to the October 2025 Census are summarised in the table below. Overall, there has been a further reduction of 768 of pupils in addition to the 559 that pupil numbers reduced in 2025/26.

PHASE	Oct-25	Oct-24	Movement
Primary (Years R-6)	22,324	22,769	(445)
Key Stage 3 (Years 7-9)	8,414	8,750	(336)
Key Stage 4 (Years 10-11)	5,754	5,741	13
	36,492	37,260	(768)

- 4.13 This drop in pupil numbers has reduced the Schools Block allocation by £2.647 million at the Primary level and £2.653 million at Secondary. This was somewhat mitigated by the rolled in grants.
- 4.14 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. In 2026/27 no schools met the criteria as discussed in Item 4 of this meeting.

- 4.15 As in previous years, further work and checking needs to be completed before submission of the Local Funding Formula and APT

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 2026/27.

PUPIL-LED FACTORS		DFE NFF 2026/27	
		PRIMARY PER PUPIL	SECONDARY PER PUPIL
BASIC ENTITLEMENT	KS1&2	£4,401	
	KS3		£6,157
	KS4		£6,943
DEPRIVATION	FSM	£547	£547
	FSM Ever 6	£1,310	£1,868
	IDACI F	£260	£374
	IDACI E	£314	£498
	IDACI D	£493	£704
	IDACI C	£541	£765
	IDACI B	£574	£823
	IDACI A	£758	£1,050
ADDITIONAL EDUCATIONAL NEEDS	LOW PRIOR ATTAINMENT	£1,299	£1,976
	EAL	£661	£1,765
	MOBILITY	£1,067	£1,532

Waltham Forest LFF 2026/27	
PRIMARY PER PUPIL	SECONDARY PER PUPIL
£4,387	£6,138
	£6,919
£547	£547
£1,310	£1,868
£260	£374
£314	£498
£493	£704
£541	£769
£574	£823
£758	£1,050
£1,299	£1,970
£661	£1,765
£1,067	£1,532

SCHOOL-LED FACTORS	
LUMP SUM (Each school)	£165,360
RATES	Actual Costs
PFI	Actual Costs
SPLIT-SITES	
Basic Eligibility	£59,668
Distance Eligibility - Maximum	£29,888

£165,360
Actual Costs
Actual Costs
£59,668
£29,888

	£0
	Actual Costs
	Actual Costs
	£0
	£0

	2025/26 LFF		25/26 SBSG		NICs grant		2026/27 LFF		Changes £		Change %	
	Primary	Secondary	Primary	Secondary	Primary	Secondary	Primary	Secondary	Primary	Secondary	Primary	Secondary
	£	£	£	£	£	£	£	£	£	£	£	£
Basic Per Pupil Funding												
Primary basic entitlement	4,168		55		78		4,387		86		2.01%	
KS3 basic entitlement		5,874		78		68		6,138		118		1.96%
KS4 basic entitlement		6,623		88		77		6,919		132		1.94%
Additonal Needs Funding												
FSM	536	536					547	547	11	11	1.98%	1.98%
FSM 6	1,148	1,685	49	72	75	60	1,310	1,868	38	51	2.98%	2.83%
IDACI F	255	368					260	374	5	5	2.09%	1.43%
IDACI E	309	488					314	498	5	11	1.71%	2.18%
IDACI D	482	688					493	704	11	16	2.21%	2.32%
IDACI C	531	753					541	769	11	16	2.00%	2.12%
IDACI B	563	807					574	823	11	16	1.88%	1.97%
IDACI A	742	1,029					758	1,050	16	21	2.15%	2.06%
EAL	645	1,728					661	1,765	16	37	2.48%	2.15%
Lower Prior Attainment	1,273	1,934					1,299	1,976	27	43	2.09%	2.20%
Mobility	1,045	1,500					1,067	1,532	21	32	2.03%	2.12%
School Led Funding												
Lump Sum per School	157,194	157,194	2086	2086	2400	2400	165,360	165,360	3,680	3,680	2.28%	2.28%
Sparsity	62,184	90,351					63,459	92,264	1,274	1,913	2.05%	2.12%
Split sites basic eligibility funding	58,501	58,501					59,668	59,668	1,167	1,167	2.00%	2.00%
Split sites distance funding	29,250	29,250					29,888	29,888	638	638	2.18%	2.18%
Minimum Per Pupil Funding												
MpFFL	4,955	6,465	94	84	66	91	5,115	6,640	0	0	0	0

Meeting / Date	14 January 2026	Agenda Item	6
Report Title	Alternative Provision- interim arrangements		
Decision/Discussion/ Information	For Information		
Report Author/ Contact Details	Mary Jarrett Corporate Director for Education Mary.jarrett@walthamforest.gov.uk		
Appendices	Schedule of payments		

1. SUMMARY

1.1 This report sets out the remit of the current review of Alternative Provision and costs for financial year 2026/7

2. RECOMMENDATIONS

2.1 The school's forum to note the remit of the Alternative Provision review and associated timescales for reporting.

2.2 The school's forum to note that the financial commitment from schools will remain as is for the remainder of academic year 2025/6 (from April- July 2026). From September 2026- March 2027 school's contributions will be reviewed as part of the Alternative Provision review with a commitment from the Local Authority to operate within the existing financial commitment from schools, but also to work, as part of the review to reduce the contribution from schools wherever possible.

2.3 An up-date paper regarding the Alternative Provision review and findings will be presented to school's forum at the School's Forum meeting on 8th July 2026.

3. RATIONALE

3.1 The Alternative Provision arrangements for 2025/6 were revised in May 2025 following a series of concerns raised by Heads. It was agreed that existing arrangements would honoured; on the understanding that the governance and finance arrangements would be subject to an independent review.

3.2 Following this decision 2 academy trusts ceased to contribute to the collective agreement but are working with the Alternative Provision review to contribute to finding solutions.

- 3.3 This Independent Review is being undertaken by ISOS Partnership <https://www.isospartnership.com/> and involves leaders from Secondary Schools across the Borough and has entered its second phase where the partnership is working together to develop solutions for funding and governance in relation to Alternative Provision in the Borough and a report will be brought to the Education Strategic Partnership Board in relation to governance recommendations and to Schools Forum with financial recommendations.
- 3.4 In addition to the ISOS review the Local Authority are undertaking a review of Alternative Provision sufficiency and demand to ensure that the Local Authority has access to a range of provisions. It is not anticipated that there will be changes to the current number of commissioned places until this review is complete. The findings of the commissioning review will be shared with the Alternative Provision review to ensure that the future conversations regarding funding are informed by costs and demands and bench-marked with nearest neighbouring authorities.

4. ALTERNATIVE PROVISION REVIEW TIMESCALES:

- 4.1 Term 1 (completed) individual interviews with Secondary Heads.
Term 2 - Working group with Secondary Heads.
Term 3 – Modelling of future state and review of Primary A.P.

Final Recommendations: to come to meeting on 8th July 2026 to inform September 2026 - March 2027 Budget position and then 2027/8 Budget (updated to reflect the final outturn position and outcomes of commissioning review).

Indicative cost to Primary schools based on historic buy in @ £12.67 per pupil on roll

School Name	NOR October 2025	April - Aug 2026
Chase Lane Primary School	625	£3,299
Whitehall Primary School	411	£2,170
Downsell Primary School	356	£1,879
Newport School	790	£4,171
Edinburgh Primary School	162	£855
Greenleaf Primary School	413	£2,180
Handsworth Primary School	419	£2,212
Thorpe Hall Primary School	333	£1,758
The Winns Primary School	616	£3,252
Oakhill Primary School	205	£1,082
Henry Maynard Primary School	714	£3,769
South Grove Primary School	430	£2,270
Dawlish Primary School	168	£887
Gwyn Jones Primary School	393	£2,075
George Tomlinson Primary School	515	£2,719
Mission Grove Primary School	687	£3,627
Coppermill Primary School	183	£966
Stoneydown Park School	604	£3,189
Parkside Primary School	616	£3,252
The Jenny Hammond Primary School	391	£2,064
Ainslie Wood Primary School	406	£2,143
Barn Croft Primary School	170	£897
Chingford CofE Primary School	404	£2,133
St Joseph's Catholic Junior School	115	£607
St Joseph's Catholic Infant School	79	£417
Our Lady and St George's Catholic Primary School	267	£1,410
St Patrick's Catholic Primary School	301	£1,589
Buxton Primary	348	£1,837
Lime Academy Larkswood	489	£2,582
Yardley Primary School	506	£2,671
Davies Lane Primary School	813	£4,292
Hillyfield Primary Academy	1057	£5,580
Sybourn Primary School	448	£2,365
Thomas Gamuel Primary School	298	£1,573
Walthamstow Primary Academy	186	£982

Indicative cost to Secondary schools based on historic buy in @ £77.52 per pupil on roll

School Name	NOR October 2025	April - Aug 2026
Frederick Bremer School	894	£28,876
Heathcote School & Science College	905	£29,232
Willowfield School	1,026	£33,140
Leytonstone School	1,030	£33,269
Walthamstow School for Girls	898	£29,005
Kelmscott School	1,142	£36,887
Holy Family Catholic School	909	£29,361
Buxton Secondary	686	£22,158
South Chingford Foundation School	550	£17,765
Connaught School for Girls	553	£17,862
Lammas School and Sixth Form	459	£14,826
Chingford Foundation School	1,087	£35,110
Walthamstow Academy	879	£28,392
George Mitchell School	579	£18,702
SECONDARY TOTAL	11,597	£ 374,583.10

Roger Ascham Primary School	369	£1,948
Longshaw Primary Academy	203	£1,072
Salisbury Manor Primary School	242	£1,278
Woodford Green Primary School	201	£1,061
Whittingham Primary Academy	337	£1,779
Mayville Primary School	255	£1,346
St Saviour's Church of England Primary School	354	£1,869
St Mary's CofE Primary School	597	£3,152
Barclay Primary School	1167	£6,161
Selwyn Primary School	614	£3,241
George Mitchell School	364	£1,922
PRIMARY TOTAL	19,621	£103,582.53