

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 21 October 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 Boutalbi	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 (Larkwood, Hornbeam)
Anne Powell	Griffin Trust (Riverley, Willow Brook, Lammas)
Maureen Okoye (Chair)	Arbor Trust (Davies Lane, Selwyn, Woodford Green, Acacia Nursery)
VACANCY	
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
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

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College)	
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 8 July 2026	Chair
3a	Decision Sheet from 8 July 2026	For the record
4	Schools Forum Membership and Powers – For Information	Jordan McDougall
5	DSG Month 4 Update 2026-27 – For Information	Jordan McDougall
6	Government Updates and 2027-28 Budget Setting– To Note & To Agree	Jordan McDougall
7	Education Services for Maintained Schools – To Note & To Agree	Jordan McDougall
8	LBWF Growth Fund 2026-27 – To Agree	Jordan McDougall
9	Extension of SENIF Funding Discussion paper – For Information	Mary Jarrett
	Date of Next Meetings: Wednesdays, 5:30pm	
	9 December 2026	- DSG Forecast Outturn Report - Budget Setting, Government Updates and Consultation outcome - Update on De-delegation - Growth fund 2027-28 and Criteria

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		• Annual Report on Early Years • Annual Report on Alternative Provision • Annual Report of High Needs
	• 20 January 2027	• DSG Forecast Outturn Report • Scheme of Financing Schools & Associated Policies • Final Budget Setting & Government Updates
	• 24 February 2027	• Early Years Block Indicative allocation
	• 14 July 2027	• Draft Outturn 2026-27 • Final Budget 2027-28 • Government updates • Review of Constitution / Membership

Total Membership 25

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DRAFT MINUTES OF SCHOOL FORUM MEETING

Day/Date/Time	Venue
Wednesday 8 July 2026, 5.30 pm	VIA TEAMS
Contact:	
Clerk to Schools Forum	Dennese.White@walthamforest.gov.uk
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Sian Boubalti	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 (Larkwood, Hornbeam)
Anne Powell	Griffin Trust (Riverley, Willow Brook, Lammas)
Maureen Okoye (Chair)	Arbor Trust (Davies Lane, Selwyn, Woodford Green, Acacia Nursery)
Vacant	
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)	
Rob Mammen	Chingford Trust (North Chingford and South Chingford)
Tracey Penfold – Olu Olalade represented on behalf of	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)	
Joe Tousent	Hawkswood Group
Non School Members (4)	
Hannah McCarthy (Footsteps Day Nursery)	Early Years Providers
Abena Rodman-Tay (Waltham Forest	16-19 Providers

College)	
Officers	
Cllr Daisy Richards	Councillor
Clare Potter	Director of Disability Enablement Service
Dennese White	Finance Business Partner
Eve McLoughlin	Head of Early Years, Childcare & Business Development
Jamel Mason	Principal Finance Officer
Jordan McDougall	Head of Finance Business Partner – Children & Education
Lucinda Lord	Principal Finance Officer
Mary Jarrett	Corporate Director of Education
Pamela Stack	Finance Business Partner - Education
Rachel Harrison	School's Financial Health Lead
Observers	
Michele Brown	Oppussum Schools
Shermaine Lewis	Frederick Bremer School
Sohana Qureshi	Greenleaf Primary School
Sue – (Unverified)	

1. Welcome and Apologies

- 1.1 Welcome: Olu Olalade represented on behalf of Tracey Penfold.
- 1.2 Apologies: Claire Nairne, Rob Pittard, Tracey Penfold

2. Declaration of Interests

- 2.1 No Declaration of Interests highlighted.

3. Minutes of 8 July 2026 Schools Forum meeting

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

3a. Decision Sheet from 8 July 2026

Noted for the record.

4 Dedicated Schools Grant Outturn 2025-26

4.1 This report informs the School Forum on the 2025-26 draft final outturn position for the Dedicated School Grant (DSG).

4.2 Schools Forum to note:

4.2.1 The 2025-26 outturn position, including balances carried forward on the DSG.

4.2.2 The latest DSG funding allocations for 2026-27 and the latest forecast outturn position

4.2.3 To note the School Balances at the end of 2025-26.

4.3 School Forum Noted the contents of this report.

4.4 Question

4.4.1 When will we know about the HNS stability grant?

4.4.2 Response

4.4.3 There are three DfE returns, DSG Note to the Accounts, Revenue Outturn report, Section 251 outturn along with the SEND reform plan for which the DfE will need to analyse, from all local authorities before the announcement. The DfE has confirmed they will make announcement in the autumn term, but we are hoping for it to be in September 2026.

4.5 Question

4.5.1 There are 43% of schools of schools in deficit. What does that mean for schools?

4.5.2 Response

4.5.3 The local authority is working with several schools which are in deficit, to see what support the LA and DfE can provide.

4.5.4 Question

This is very worrying for schools, as some schools can absorb this more than others. We know that the LA officials are working with schools, but however what kind of tangible support can be provided to teachers who are currently going through this experience. For e.g., counselling.

4.5.5 Response

At the Headteachers meeting last week, we mentioned maximising value for pupil's programme for which the DfE is rolling out, this has resources and signpost. We do not know if wellbeing will be a part of the support, as we know there is a lot of pressure on Headteachers, school staff and LA officials,

not only financial, but the whole school life and hope the DfE adds wellbeing resources and support to maximise value.

5 Government Update

5.1 To provide the Schools Forum with an update on Government announcements relating to the grants in 2026/27

5.2 School Forum to Note:

5.2.1 The latest updates on school grants for 2026/27.

5.3 School Forum Noted the contents of this report.

5.4 Comment

5.4.1 Splitting these funding into different can be confusing.

5.4.2 Question

5.4.3 The net effect are we going to be gaining or losing more money.

5.4.4 Response

Do you mean the free school meals expansion grant? There are a lot of moving parts. The DfE are calculating the free schools' meals expansion grant on the net difference from October 2025 to October 2026 in pupils allowable for free school meals, therefore some local authorities will feel the loss of the protection that have been in place. This could be an impact of up to 40% that lose their eligibility, but the DfE is thinking it will be 20%. We do not know, we would like to think it will help schools but suspect it will put schools under pressure.

5.4.5 Comment

Therefore, we should expect 20-40% depending on your deprivation index, which would only add to the current pressure.

5.4.6 Comment

I welcome this information and find it very useful. Can the LA officers provide this information to the Energy Team, so we can get the best deals for energy, as we have always worked with the energy team who reassures that we get the best value. Also, if we could continue working with the Energy Team but also linking up with the DfE to see what savings we can obtain. It would be nice to know they are all aligned with the savings the DfE is aware of.

5.4.7 Comment

I have already had my energy report from the DfE, and they confirm there are savings to be obtained. I also had a meeting with LA officers who confirmed that Waltham Forest have a 1 year secured deal that energy prices are going to be kept and captured the same. Could we have more information as my report shows I would be able to save £20k if I go with the DfE, but when this was questioned, it was confirmed we have a very good deal with Waltham Forest. Therefore, we need clarity on which is more affordable.

5.4.8 Comment

I will take this information to the WF Energy Team to ascertain what potential there is for schools. I will also confirm the schools prefer to work with WF Energy Team, then the DfE.

6 2026/27 Scheme for Financing Schools

6.1 This report presents the updated *Scheme for Financing Schools* for Schools Forum consideration and approval, in line with the Department for Education (DfE) requirements for the 2026/27 financial year.

6.2 School Forum to approve:

6.2.1 The updated Scheme for Financing Schools, which is in line with 2026/27 DfE requirements as set out in **Appendix A**, and for information the last approved Scheme with tracked changes included at **Appendix B**. The Scheme and this decision apply only to Maintained Schools.

6.2.2 To Vote Agree: - 9, Disagree – 0

6.3 Question

The Scheme was not updated since 2022, why was the scheme not updated? For us schools which have been in SFFC has had a lot of ambiguity up to this point.

6.3.1 Response

Apologies. This was a resources issue, but I can confirm to you the Scheme for Financing Schools will be updated annually.

6.3.2 Response

I welcome the clarity. However as mentioned before regarding the ambiguity, what does this mean for schools in SFFC, who are under different arrangements?

6.3.3 Response

There will be no difference to the scheme, what we are doing is bringing to light all the information that is already in the scheme and making clear. This is a statutory document which should always exist and have always existed at the LA, it just unfortunately it was not updated for a few years. The principles are the same, it's just that some of the wording would be updated to be aligned with the how DfE word information.

6.4 Question

In terms of the SFFC programme, which is part of the scheme, what consultation was undertaken to inform the schools of the changes?

6.4.1 Response

There has been no consultation, it is part of our support and oversight arrangement we are providing as a local authority. The core principles already exist within the current programme that you know as SFFC, we are taking the opportunity to refresh, strengthen and rename it so that it better reflects where we are currently. It does not need approval because it is around support arrangements, the main items which are within the SFFC programme are within the scheme, such as the monitoring requirements, the recovery plan and the notice of concern and our relationship to show what the scheme provides.

6.5 Question

You refer to license deficit earlier and one of the problems with not having a live scheme for, was to do with the clarity of the length of a license deficit, it is now stated in the scheme and in line with the DfE as 3 years, except for exceptional circumstances. Is there a statement to specify what are exceptional circumstances?

6.5.1 Response

At this point no, I am not aware. We will need to use the DfE guidance which is the 3 years recovery period. Regarding exceptional circumstances, it says it on the label, it is exceptional circumstances, so for us to set those parameters, is not a reasonable expectation on the council. I have not seen any other council outlined what are exceptional circumstances, because we must deal with the nuances of each individual school such as, the level of deficit, the engagement and the recovery plan, we are seeking advice from the DfE so those information sits independently and gives another viewpoint. I

think it is almost impossible to define exceptional circumstances, especially right now.

6.5.2 Comment

This is my concern from the point of view of; a significant number of schools are in deficit. Most schools on the benchmarking information are spending more than their income and are carried forward by any reserves the school have. A recovery at the speed that schools are falling into a recovery is very challenging, if schools are like mine, we have cut everything already, we are running on breadcrumbs, to get these recoveries within the timescale, it means cutting fundamental core services, that is why I am interested to know what exceptional circumstances are.

6.5.3 Response

I understand. However, from the reports I have seen from the DfE, they have suggested several mitigations with material numbers attached. It suggests recovery is possible within 3 years. This is why as a local authority we have internal governance which will review case by case and always be reasonable, but we cannot put a definition this is what exceptional circumstances mean.

6.6 Question

The document is to be used to hold schools to account to the local authority. What is the process if a school feels the local authority have not followed this process?

6.6.1 Response

The DfE is there to listen to both sides, also there is local authority complaints process.

6.6.2 Comment

I will find out the process for supporting both the school and the LA.

6.6.3 Comment

Yes, this is always a deeply uncomfortable conversation, isn't it? Because I think we'd all like a magic money tree at the end of the garden. I think we are trying very hard as a council to balance the need to support schools wherever possible to make changes and adjustments in the light of what has been a rapidly changing situation in the borough. We have far fewer pupils now than we've ever had.

There is less money in the system than there's ever been. There have been unfunded pay rises, and I note that there is another unfunded pay rise coming in in the autumn. So, we are operating in a really, really tight economic environment and I think it's incumbent on all of us in the maintained sector to recognise that our money is your money.

Your money is our money. If you can't pay your staff by the end of the financial year because you are overspent, we must find that money from council reserves. There's no other way around it. We must make sure that teaching staff get paid and therefore it's incumbent on all of us to make the best use of the resources. I wanted to come back to the exceptional circumstances, and we've been talking about this because we have considered exceptional circumstances at our education oversight board, because nobody in this situation wants to drive heads into the ground, schools into the ground, or deliver poor education outcomes for children. That's nobody's intention in this space. I think we really do think that five years is a very, very long time in the cycle of a school to address what can become rapidly escalating deficit positions. Five years, quite frankly, I won't be here in five years' time. I will be retired and hopefully sitting somewhere where there's air conditioning. You know, we need to be mindful that five years is a very, very long time, particularly for children. So from my perspective, the guidance is 3 years and we would need to start operating within three years. However, when there is an exceptionally large deficit, for example, a single form entry primary school, so your financial leaders are much smaller, where we're convinced that the plan to recover the budget is sensible, proportionate, incremental, going to make changes without significantly jeopardising the day-to-day running of the school, but will take longer than three years. That's absolutely an exceptional circumstance where we can see significant financial recovery within the first three years and maybe a little bit of a reducing deficit in the 4th year. And then by the 5th year, the budget is balanced again. It's an exceptional circumstance, but we would happily sign that off.

So I think this is a space where everybody is trying to be reasonable. What isn't reasonable is to say to the local authority, we can't do anything, we don't want to touch it and we'll just sit here for five years saying we can't do it because that's not fair on anybody, not least council taxpayers, because we are having to take money out of council reserves to pay for school staff and we can't keep doing that either.

You know, we've got financial governance arrangements. So, I think it's incumbent on all of us to be really solution focused on this space. We've used some good interventions through the DFE. We can all escalate to the DFE if

we're not happy with the way the other ones operating. But I think the process is to be fair, open and transparent and to make sure we're giving the right advice and support to your school business managers to ensure that wherever possible, we're being as effective as we can with our guardianship of public money and if it was easy, none of us would be sitting here.

6.6.4 Comment

This is very sensitive and some aspects of this need to be dealt with a lot of sensitivity and I thank the officials for their support.

6.7 Question

What type of support do we have for Heads of School?

6.7.1 Response

Over the last year, we've put additional money into our school improvement contract. There is a welfare offer through our HEP contract. We also have the employee assistance programme. We have also, where necessary, made extraordinary arrangements at the behest of the head's unions, who I meet with regularly to discuss heads wellbeing. We're also talking about change management support for heads because I realise none of us like doing a restructure. I've just come to the end of mine and it's been gruelling. We have a particularly volatile situation with the NEU which causes undue stress to heads. Just recently we have full school balloting for strikes over maternity pay. We walk some very, very tight and stressful situations in this borough and we will constantly work to support our heads who do an amazing job for our children and young people and who are passionate about delivering their outcomes. So there are a range of supports and I would say to any head in this space, if it feels like you are struggling, please do reach out and if not to me, reach out to your unions and we will support however we can because we recognise what an incredibly lonely and stressful job being a head can be sometimes.

6.7.2 Comment

I am sure colleagues will take up that offer if they feel the need to

7 Alternative Provision – Review and next Steps

7.1 This report sets out the initial findings of the review of Alternative Provision for Secondary School pupils, the timescales and remit of the Primary phase review of Alternative Provision

7.2 This report therefore sets out costs and proposed commissioning arrangements for the next 3 years.

7.3 School Forum to Note:

7.3.1 The school's forum to note the recommendations and actions from the Alternative Provision review (Primary and Secondary phases). appendices 1 and 2.

7.3.2 The school's forum to note that the financial commitment from both primary and secondary schools will remain fixed as per financial year 25/6 for the next 3 years. (Until end of March 2030). See Appendix 3 Schedule of payments.

7.3.3 School Forum to approve:

7.3.4 That Schools Forum approve the scheduling of the Annual Review of Commissioned Alternative Provision arrangements as part of Schools Forum Forward plan in January 2027 and annually thereafter as per revised Commissioning arrangements.

7.4 **School Forum noted the contents of this report.**

7.5 **To Vote: Agree – 14, Disagree - 0**

7.6 Question

This is quite extensive and quite a lot of work completed. The secondary phase is completed, and the primary is still in progress. Do we have a timeline for the primary?

7.7 Response

Yes, I think it is in the appendices to the report. The AP review should conclude at the end of this term for primary, but there are still some weeks to run and then there'll be some recommendations. What I will say is the early signs are that we know, the children who go into AP at primary are often

children with unmet certain needs or quite extensively troubled home lives. And therefore, we think that

the need to kind of keep an inclusion panel and to have that more multi-agency, but not to dramatically change our systems is probably the right thing to do. But we're testing that at the roundtable next week and I will bring an update in early autumn.

8 SEND Reform Plan

8.1 This report provides an update on the SEND Reform Plan submission to Department for Education, a summary of the local area plan and response and an outline of next steps.

8.2 School forum to note:

8.2.1 The submission of the SEND Reform plan

8.2.2 That a detailed breakdown of SEND Reform plan spend and Experts at Hand model and implications for HNB is scheduled for Schools Forum October 2026

8.3 Comment

More information will be brought to school forum in October!

8.3.1 Response

Yes. Over the course of quarterly reporting because I think we will be required to report quarterly about our finances to do the DFE so it's right and proper that it comes to Schools Forum for oversight and transparency.

9 AOB

10 Thank you.

Thank you to Officials who have prepared the reports. Have a wonderful holiday when it comes. Please do rest. Everyone's been through quite a lot this academic year. Thank you to everyone. Take care. Bye.

The next meeting is on the 21st of October 2026 at 5.30pm

Schools Forum, 8 July 2026

Summary of Decisions

4 Dedicated Schools Grant Outturn 2025-26

4.1 Schools Forum to note:

4.2 To note the 2025-26 outturn position, including balances carried forward on the DSG.

4.2.1 To note the latest DSG funding allocations for 2026-27 and the latest forecast outturn position.

4.2.2 To note the School Balances at the end of 2025-26.

5 Government Update

5.1 School Forum to note:

5.2 The latest updates on school grants for 2026/27

6 2026/27 Scheme for Financing Schools

6.2.1 School Forum to approve:

6.2 The updated Scheme for Financing Schools, which is in line with 2026/27 DfE requirements as set out in **Appendix A**, and for information the last approved Scheme with tracked changes included at **Appendix B**. The Scheme and this decision apply only to Maintained Schools.

6.3 To Vote: Agree:- 14, Disagree - 0

7 Alternative Provision – Review and next steps

7.1 School Forum to note:

7.2 The recommendations and actions from the Alternative Provision review (Primary and Secondary phases). Appendices 1 and 2.

7.2.1 The financial commitment from both primary and secondary schools will remain fixed as per financial year 25/26 for the next 3 years. (Until end of March 2030). See appendix 3 Schedule of payments.

7.3 School Forum to approve:

7.3.1 The scheduling of the Annual Review of Commissioned Alternative Provision arrangements as part of Schools Forum Forward plan in January 2027 and annually thereafter as per revised Commissioning arrangements.

7.4 To Vote: Agree: - 9, Disagree - 0

8 SEND Reform Plan

8.1 School Forum to Note:

8.2 The submission of the SEND Reform plan

8.2.1 That a detailed breakdown of SEND Reform plan spend and Experts at Hand model and implications for HNB is scheduled for Schools Forum October 2026.

Meeting / Date	SCHOOLS FORUM 21 October 2026	Agenda Item	4
Report Title	Schools Forum membership and powers		
Decision/Discussion/ Information	For Discussion and Decision		
Report Author/ Contact details	Jordan McDougall, Head of Finance Business Partner- Children & Education Jordan.McDougall@walthamforest.gov.uk		
Appendix A	Schools' Forum powers and responsibilities		

1. SUMMARY

- 1.1 This report reviews the representation of maintained schools and academies / free schools at Schools Forum following the October 2025 census.

2. RECOMMENDATIONS

2.1 Schools Forum to agree:

- 2.1.1 That the current balance of school representation is appropriate to continue for the 2026-27 session.

3. REASON

- 3.1 The balance of representation at Schools Forum should be broadly proportionate to the number of pupils in each group of schools.

4. BACKGROUND

4.1 Schools Forum guidance

- 4.1.1 The Schools Forums Regulations provide a framework for the appointment of members but allow a considerable degree of discretion to accommodate local priorities and practice.
- 4.1.2 Schools Forum powers and responsibilities are included as Appendix A to this report and can be found with the Schools Forum Operational and good practice guide, March 2021:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/971711/2021_Schools_forums_powers_and_responsibilities.pdf

4.2 Represented Groups

- 4.2.1 Schools members and academies members must comprise at least 2/3rds of the Schools Forum membership.
- 4.2.2 Maintained primary schools; maintained secondary schools; and academies and free schools must be broadly proportionately represented on Schools Forum, based on the total number of pupils registered at them.

4.3 Maintained Schools members

- 4.3.1 Where the LA maintains the following types of school, they must be represented on the schools Forum: Primary Schools; Secondary Schools; Special Schools; Nursery Schools; and PRUs.
- 4.3.2 Within each of the five groups above there could be the following types of members: Headteachers (or their representative); and Governors.
- 4.3.3 In overall terms there must be at least one headteacher (or their representative) and one governor.
- 4.3.4 The relevant sub-group of the relevant type of school elects their representatives e.g., primary school governor representatives are elected by the governors of primary schools, secondary school headteacher representatives are elected by the headteachers of secondary schools.
- 4.3.5 LA appointment of members may occur only if no election takes place by the agreed date or in the event of a tie.

4.4 Academy and free school members

- 4.4.1 At least one academies member must be a representative of mainstream academies, which includes free schools, UTCs and Studio Schools.
- 4.4.2 In addition, there must be one member for each of the following groups (if such exist in the LA area): Special academies, including free schools; and Alternative Provision academies, including free schools.
- 4.4.3 The relevant proprietors of academies elect for their group, e.g. mainstream academies, special academies, and alternative provision academies.
- 4.4.4 LA appointment of members may occur only if no election takes place by the agreed date or in the event of a tie.

4.5 Non-school members

- 4.5.1 There are four non-school members: Early Years Private, Voluntary, and Independent (PVI) providers; 16-19 providers; Trade Unions; and a diocesan representative.
- 4.5.2 Before considering other groups, the LA must consider diocesan representation.

4.6 Practice in Waltham Forest

- 4.6.1 Membership has been uncontested recently and it has been the practice for groups to co-opt new members or for the LA to appoint members rather than hold elections. Where more than one individual expresses an interest in membership, the LA will facilitate an election, where the subgroup will vote for the nominated representative.

4.7 October 2025

- 4.7.1 Following the October 2025 school census, it appears that the balance of representation at Schools Forum remains broadly proportionate to the number of pupils in each group of schools, see Table below.

	Maintained Primary	Maintained Secondary	Academy and Free
Number on Roll October 2025	11,495	7,490	17,532
Members*	6	3	8
Members per pupil	1,900	2,500	2,200

*Maintained Primary and Secondary Members include 1 Governor in each group

- 4.7.2 The full Membership will comprise:

FULL MEMBERSHIP		
Academies and Free Schools	8	
Maintained Primary Schools	6	*
Maintained Secondary Schools	3	*
Maintained Nursery Schools	1	
Maintained PRU	1	
Maintained Special School	1	
Special Academies	1	
SCHOOL MEMBERS	21	
Early Years Private, Voluntary & Independent providers	1	
Post 16 providers	1	
Diocesan representative	1	
Trade Unions representative	1	
TOTAL MEMBERSHIP	25	
*Must include 1 Governor		



Schools forum powers and responsibilities

A summary of the powers and responsibilities of schools forums.

Function	Local authority	Schools forum	DfE role
Formula change (including redistributions)	Proposes and decides	Must be consulted [voting restrictions apply - see schools forum structure document] and informs the governing bodies of all consultations	Checks for compliance with regulations
Movement of up to 0.5% from the schools block to other blocks	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
Contracts (where the LA is entering a contract to be funded from the schools budget)	Proposes at least one month prior to invitation to tender, the terms of any proposed contract	Gives a view and informs the governing bodies of all consultations	None

Function	Local authority	Schools forum	DfE role
Financial issues relating to: • arrangements for pupils with special educational needs, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding • arrangements for use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding • arrangements for early years provision • administration arrangements for the allocation of central government grants	Consults annually	Gives a view and informs the governing bodies of all consultations	None
Minimum funding guarantee (MFG)	Proposes any exclusions from MFG for application to DfE	Gives a view	Approval to application for exclusions

Function	Local authority	Schools forum	DfE role
De-delegation for mainstream maintained schools for: - contingencies - administration of free school meals - insurance - licences/subscriptions - staff costs – supply cover - support for minority ethnic pupils/underachieving groups - behaviour support services - library and museum services - School improvement	Proposes	Maintained primary and secondary school member representatives will decide for their phase. Middle schools are treated according to their deemed status	Will adjudicate where schools forum does not agree LA proposal
General Duties for maintained schools Contribution to responsibilities that local authorities hold for maintained schools (please see operational guide for more information)	Proposes	Would be decided by the relevant maintained school members (primary, secondary, special and PRU).	Adjudicates where schools forum does not agree LA proposal
Central spend on and the criteria for allocating funding from: funding for significant pre-16 pupil growth, including new schools set up to meet basic need, whether maintained or academy	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
funding for good or outstanding schools with falling rolls where growth in pupil numbers is expected within three years			
Central spend on: - early years block provision - funding to enable all schools to meet the infant class size requirement - back-pay for equal pay claims - remission of boarding fees at maintained schools and academies - places in independent schools for non-SEN pupils - admissions - servicing of schools forum - Contribution to responsibilities that local authorities hold for all schools	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
Central spend on: - capital expenditure funded from revenue – projects must have been planned and decided on prior to April 2013 so no new projects can be charged - contribution to combined budgets – this is where the schools forum agreed prior to April 2013 a	Proposes up to the value committed in the previous financial year and where expenditure has already been committed.	Decides for each line	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
contribution from the schools budget to services which would otherwise be funded from other sources - existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged) - prudential borrowing costs – the commitment must have been approved prior to April 2013	Read establishing local authority DSG baselines for more information.		
Central spend on: - high needs block provision - central licences negotiated by the Secretary of State	Decides	None, but good practice to inform forum	None
Scheme of financial management changes	Proposes and consults the governing body and Head of every school	Approves (schools members only)	Adjudicates where schools forum does not agree LA proposal
Membership: length of office of members	Decides	None (but good practice would suggest that they gave a view)	None
Voting procedures	None	Determine voting procedures	None

Function	Local authority	Schools forum	DfE role
Chair of schools forum	Facilitates	Elects (may not be an elected member of the Council or officer)	None

LONDON BOROUGH OF WALTHAM FOREST

Meeting / Date	SCHOOLS FORUM 21 October 2026	Agenda Item	5
Report Title	Dedicated Schools Grant 2026-27 Forecast		
Decision/ Discussion/ Information	For Information		
Report Author/ Contact details	Jordan McDougall, Head of Finance - Children & Education jordan.mcdougall@walthamforest.gov.uk		

1. Summary

- 1.1 This report updates the School Forum on the 2026/27 forecast outturn position of the Dedicated Schools Grant.

2. Recommendations

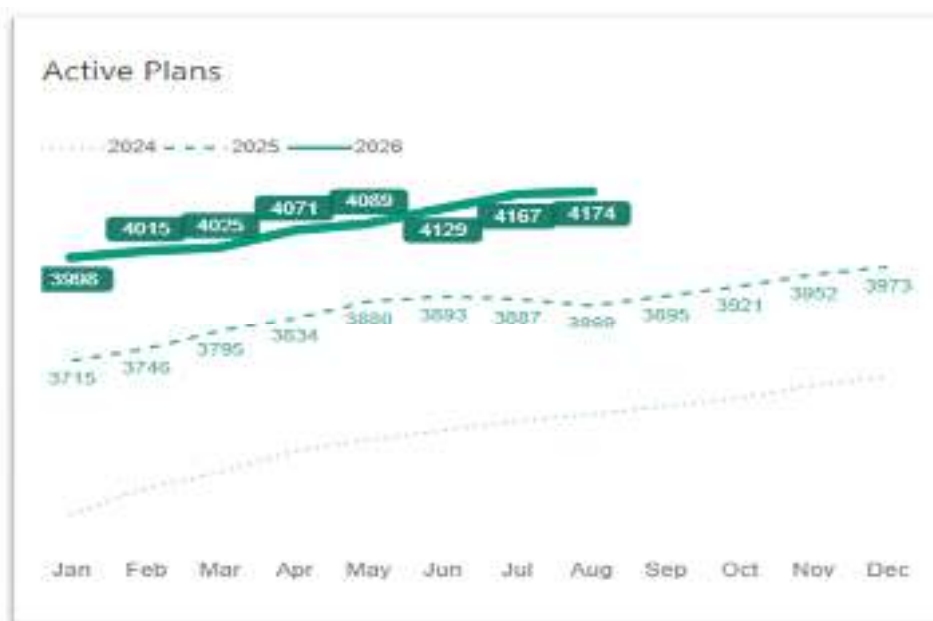
- 2.1 To note the latest DSG funding allocations for 2026/27 and the latest forecast outturn position as at M4 (July 2026) the last reported position.
- 2.2 To note the latest update on the statutory override position for DSG deficits.

3. 2026/27 Forecast Outturn Report

- 3.1 The 2026/27 DSG allocation following recoupment is £294.946m across all four funding blocks. Table 1 sets out the DSG Local Authority allocations by block for 2026/27, the forecast outturn and in year deficits.

DSG Block	2026/27 DSG Allocation	2026/27 DSG Post Recoupment	2026/27 Forecast Spend	In-year (Surplus)/ Deficit
	£m	£m	£m	£m
Schools Block	259.370	133.383	133.383	0
High Needs	65.872	55.768	69.450	13.682
CSSB	1.948	1.948	1.948	0
Early Years	53.849	53.849	53.849	0
Total	381.038	244.946	258.630	13.682

- 3.2 The Schools Block and the Central Schools Services block (CSSB) are forecast with nil variance as expenditure is mainly formula driven or fixed with few risks. Since M4, it has been indicated that there is likely to be an underspend in the Schools block related to the reduction in the recoupment for Lammas Secondary school due to the partial closure in the Academic Year 2026/27. Future reporting will be updated accordingly.
- 3.3 The Early Years block is forecast to break even / nil variance to budget at this time as the outturn is dependent on actual take up of free early education places on a termly basis and budget adjustments made by the Department for Education (DfE) in year based on termly census returns.
- 3.4 For 2026/27 3% of the allocations for FEEE entitlements can be centrally retained for staffing and other expenditure related to delivering the LA's early years and childcare statutory duties. Expenditure is forecast to be contained within the available centrally retained budget envelope. Any overspends would need to be met from the LBWF General Fund, and any underspends will be added to the DSG Adjustment Account as an unusable reserve.
- 3.5 The DfE has changed the annual budget allocation methodology moving from an allocation based on January census, to allocations based on termly census for the first time this financial year. The impact of this is yet to be fully understood/evidenced. A contingency is reserved to pay providers where children are admitted after census date to ensure that all eligible children can access the FEEE entitlements. There are risks that the contingency will not be sufficient to meet demand, and we are discussing with the DfE how to treat any potential overspends.
- 3.6 The High Needs Block forecast is a deficit of £13.682m due to the increasing number of Education & Health Care Plans (EHCP's) in mainstream settings. This is an unfavourable movement from the last report of £2.627m.
- 3.7 In line with national pressures, the high needs block continues to experience pressures as demand and cost increases far exceed the additional funding received for 2026/27. The below graph shows an increase of 201 in the number of EHCPs since March 2026 to August 2026, which represents a 5% increase.



- 3.8 High level modelling of the high needs block has been undertaken as part of the SEND reforms. This anticipates a growth in plans whilst the reforms are being embedded. Waltham Forest intends to create a system in which needs are identified early, and professionals know where to go to get advice, training and support to enable them to meet need. This will enable all children and young people with special educational needs and disabilities to have what they need to achieve their full potential in their early years, at school, and in college, so they may lead happy, healthy, and fulfilled lives into adulthood. The plan was submitted in June 2026. The Q2 monitoring is due to be submitted at the end of October.

4. DSG CUMULATIVE 2026/27 FORECAST OUTTURN

- 4.1 The historic DSG balances reported for each block are summarised in Table 2, including a forecast balance for 31st March 2027.

DSG Reserves	Opening Balance (1 April 2026)	In-Year Balance	High Needs Stability Grant	Block Transfers – Deficit Un-Ring Fencing	Closing Balance (31 March 2027)
Surplus / (Deficit)	£M	£M	£M	£M	£M
Schools	(1.041)	0	0	1.041	0
Central Schools	(0.062)	0	0	0.062	0
High Needs	19.786	13.682	(12.889)	(5.465)	15.115
Early Years	(4.362)	0	0	4.362	0
Total	14.321	13.682	(12.889)	0	15.115

5. STATUTORY OVERRIDE AND HIGH NEEDS STABILITY GRANT

- 5.1 The DSG Statutory Override has been extended from March 2026 to March 2028. This allows the Local Authority to record the deficit as an Unusable Reserve, and it does not need to be offset by other balances in the LA accounts. We received confirmation on Friday 2nd October 2026 that our SEND Reform plan has been accepted with an indicative allocation for the High Needs Stability Grant of £12.889m.
- 5.2 The government has also announced further support for deficits arising in 2026/27 and 2027/28 before the statutory override ends from 1 April 2028, however the level of support has not yet been announced.

London Borough of Waltham Forest

Meeting / Date:	SCHOOLS FORUM 21 October 2026	Agenda Item	6
Report Title:	Government Updates and 2027-28 Budget Setting		
Action Required	For input / approval / discussion		
Report Author/Contact details	Jordan McDougall, Head of Finance - Children & Education jordan.mcdougall@walthamforest.gov.uk		

1. SUMMARY

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

2. RECOMMENDATIONS

- 2.1. That the Schools forum notes the latest updates on the national funding formula (NFF) and the DSG
- 2.2. That the Schools forum agrees the draft 2027/28 budget consultation (Annex A) on managing the schools block formula within the funding allocation.

3. HEADLINES AND CHANGES FOR 2027/28

- 3.1. It is expected that LAs will continue to set local funding formula in 2027/28 within the DfE parameters which are expected to be finalised later in the autumn. The 2027/28 NFF for schools and high needs is also expected to be announced later in autumn, in line with the usual timetable. This is expected to confirm requirements on LAs to bring their local funding formulae closer to the NFF in 2027/28.
- 3.2. In 2027/28, as in previous years, each LA will continue to set a local school formula, in consultation with local schools and Schools Forum. Upon approval of the consultation questions by Schools Forum, details will be shared with all schools to provide their feedback ahead of a decision being made at Schools Forum in December.
- 3.3. The DfE normally publish all supporting documents on the NFF (including the school's operational guidance and technical note) for the following financial year in the Autumn Term. The dedicated schools grant (DSG) allocations will then be published in December 2026.
- 3.4. In July 2026, the then secretary of State for Education provided a written statement addressing several key areas. There is a 2 year pay award for

teachers of 3.5% from September 2026 and an additional 3% from September 2027. The bottom of the unqualified teacher pay range has been uplifted by 5%, supporting employment-based routes into teaching. The Department is providing an additional £700m for 2026/27 rising to £1.1bn from 2027/28 to help meet the impact of teacher pay costs. This additional funding will be rolled into the National Funding Formula for 2027/28 which will be published in the Autumn Term.

- 3.5. The government is providing £700m top up to fund 1.7% of the award and announced in September that a further £500m would be made available to schools through the reduction in employer's pensions contributions for support staff that came into effect in April 2026. Original plans by the government to claw back these savings have been dropped.
- 3.6. From April 2027 the cost of employer's contributions to the Teachers' Pension Scheme will decrease in line with the recently published valuations. Where previous support for increased pension costs has been rolled into the NFF, the government announced that this will be adjusted accordingly. This will incorporate the decrease in core school funding allocations from 1st April 2027 for maintained schools and 1st September 2027 for academies. Detailed considerations will be included in the Government updates paper.
- 3.7. The government has accepted the STRB's recommendation to enable schools to offer non-consolidated payments/bonuses to teachers so they have the option to offer modest recognition schemes to reward their staff.
- 3.8. The additional funding for pre-16 schools and high needs providers will be distributed through the Schools Budget Support Grant 2026 (SBSG 26) the Early Years Teacher Pay Grant 2026. Funding for 16-19 schools will be distributed via 16 to 19 allocations.

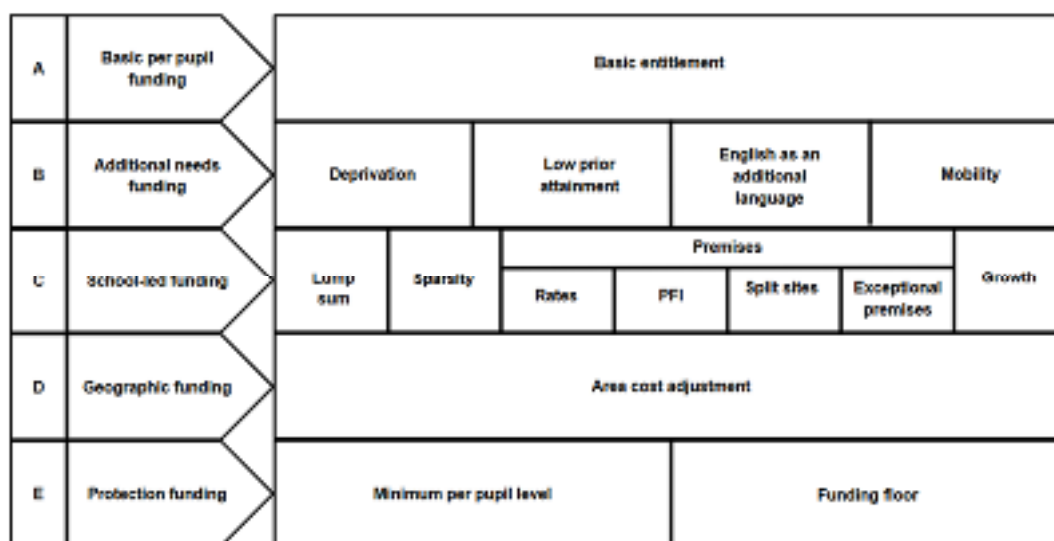
Summary of Main Changes (National)

- 3.9. The DfE announced on 30 June 2025 that following the 2025 Spending Review there would be uplifts to the Schools Core Budget as detailed below.

	2025/26	2026/27	2027/28	2028/29
	£bn	£bn	£bn	£bn
Schools Core Budget	64.8	67	68.4	69.5
Increase from previous year	3.2	2.2	1.4	1.1

- 3.10. Whilst the year-on-year increase is smaller than the previous year, pupil numbers are declining due to the lower birth rate and as most funding is distributed on a per pupil basis, the overall budget is lower. The DfE forecast that nationally pupil numbers will not start to rise until 2029/20.
- 3.11. The final factors for 2027/28 have now been published and there are no changes from the current arrangement of 16 funding factors, most of which are mandatory for all local authorities. These mandatory factors remain unchanged from 2026/27. The specific requirements for the values of these factors in local funding formulae will be confirmed when the NFF allocations are published.

Diagram 1 shows the provisional factor values that have been used in prior years.



- 3.12. As in previous years, local factor values within 2.5% of the respective NFF values will be taken as 'mirroring' the NFF. This means that local authorities with factor values within +/- 2.5% of the NFF values in 2026 to 2027 can set their 2027 to 2028 factor values anywhere within +/- 2.5% of the 2026 to 2027 NFF values.
- 3.13. In previous years, Waltham Forest has used the NFF figures apart from the Basic Entitlement which has been adjusted to ensure the overall affordability of the Block.
- 3.14. The 2027/28 DSG allocation updated for the October 2026 schools census will be published in December 2026.

4. SCHOOLS BLOCK

- 4.1. The DfE has not yet announced the impact on the National Funding Formula Factors or the Minimum Per Pupil Level of the following items: Free School Meals Expansion Grant, School Budget Support Grant 2026 and the Teacher's Pension Employer's Contributions Grant. We will advise Schools Forum in due course when they are announced.

5. CONSIDERATIONS FOR WALTHAM FOREST

- 5.1. Outcome of the formula for 2026/27 required a top slice to the AWPU of 0.32% to manage the overall cost on the block, including the cost of the growth fund. The following table shows the summary.

Factor	26/27 NFF value including ACA £	26/27 APT minimum value £	26/27 APT maximum value £	26/27 LBWF AWPU £	% reduction
Primary basic entitlement	4,400.95	4,290.92	4,510.97	4,386.95	0.32%
KS3 basic entitlement	6,157.43	6,003.49	6,311.36	6,137.73	0.32%
KS4 basic entitlement	6,941.45	6,767.92	7,114.99	6,919.24	0.32%

- 5.2. This was driven by the need to apply Minimum Funding Guarantee Adjustments related to using the highest allowable value of 0%. 19 schools received MFG adjustments at a total value of £1.790m.
- 5.3. Although we do not currently have the latest funding allocations for 2027/28, given how late they are made available, we need to be prepared for how we will manage the overall schools block in case of a surplus or deficit.
- 5.4. The principles we have discussed and agreed in previous years was:
- To manage any surpluses or deficits via adjustment to the AWPU up to the maximum limits.
 - In circumstances where there has been a surplus that has exceeded the maximum increase allowable to the AWPU rate, residual balances have been transferred to the growth fund.
- 5.5. Although these principles have been applied consistently in recent years, we are required to consult annually with all schools and Schools Forum. We have prepared a survey to ask Schools Forum to approve before distribution to schools.
- 5.6. **Reduction in the AWPU:** the impact of this would need to be assessed as this could simply result in more protection through other formula factors (e.g. MFG and the minimum per pupil funding levels). However, it is expected that local authorities will continue to be required to bring their own formulae closer to the schools NFF. We expect this to mean local authorities must move their local formula factor values at least 10% closer to the NFF, except where they are already mirroring the NFF, which will restrict the amount that can be adjusted through this formula factor. In previous years this option has been chosen as the preferred option to manage the schools block pressure.
- 5.7. **Reduction in formula factors:** the formula is made up of other factors such as deprivation, English as an additional language, free school meals, prior attainment and deprivation. Any of the factors could be considered for reduction however this would not affect schools evenly as this funding is intended to recognise the additional need of those pupils. As above we expect local authorities will be required to bring these factor values at least 10% closer to

the NFF, which will restrict the amount that can be adjusted through these formula factors.

6. CENTRAL SCHOOL SERVICES BLOCK (CSSB)

- 6.1. The government has not confirmed the provisional level of funding for the CSSB for 2026/27 nor issued the NFF technical note and policy document.

7. DE-DELEGATED SERVICES

- 7.1. De-delegated services are for maintained schools only and funding for these services must be allocated through the formula but can be passed back or de-delegated for maintained mainstream primary and secondary schools. The request for 2027/28 de-delegated services will be requested to Schools Forum in December. At this stage there is no further information for future years on how and if this will be affected by the introduction of the hard formula.

8. HIGH NEEDS BLOCK

- 8.1. The high needs block technical guidance will be published later this year and further information on this will be presented at the December 2026 or January 2027 schools forum meeting, depending on release date.
- 8.2. The High Needs Block continues to evolve following the release of the White Paper earlier this year and we will update Schools Forum as information is released.

9. EARLY YEARS

- 9.1 Further information on the funding rates for 2027/28 are expected when the funding rates are published in autumn 2026. A full update is usually brought to the February Schools Forum meeting.

10. GENERAL – DSG DEFICIT REPORTING

- 10.1. An increasing number of LAs including Waltham Forest have been incurring a deficit on their overall DSG account, largely because of overspends on the high needs block. As a result, the LA continues to report to the DfE on the management of the high needs block deficits as part of the SEND Reforms requirements.

11. TIMELINE

- 11.1. The DfE plan to publish the NFF allocations and supporting documentation (including operational guidance) in autumn 2026. In 2025 this was published in late November. It is expected that the DSG allocations using the NFF will be published in December 2026 as in **previous** years. The authority proforma tool

(APT) will be released for local authority submissions in mid-December 2026 with a deadline return date towards the end of January 2027. The APT will again be populated from schools block data, primarily drawn from the autumn 2026 schools

12. OTHER SCHOOL FUNDING UPDATES

- 12.1. **PE and Sport Grant** – The DfE announced in May 2026 that the PE and Sports Grant would be discontinued at the end of 2025/26 Academic Year and replaced by new partnerships networks. However, in July 2026, the DfE wrote to schools delaying the implementation of the changes and continuing to use previous methodology. This was confirmed in September 2026, allocations will be published by the end of October 2026.
- 12.2. **Free School Meals** – From the start of 2026/27 School Year all children from households in receipt of Universal Credit will be eligible for free school meals. Transitional protections have been in place since April 2018 due to the roll out of Universal Credit. It is the Department for Education's intention that all protections will be discontinued, alongside an extension to the eligibility criteria for free school meals. From this point, households must meet the eligibility criteria to be entitled to free school meals. The grant will be paid in February 2027 and from 2027/28 will be paid through the APT.
- 12.3. **Universal Infant Free School Meals** – Since September 2014, state funded schools in England have been required by law to provide free lunches to pupils in reception, year 1 and year 2, who are not otherwise entitled to benefits-related free school meals. The rate for 2026/27 is £2.66 and rates for 2027/28 have not yet been published.
- 12.4. **Teachers' Pension Employer Contribution Grant (TPECG)** - Funding from this grant has now all been rolled into other funding streams.
- For mainstream school settings, the funding has been rolled into the school NFF. The DfE has published how this will be rolled back from 1st April 2027 in respect of the reduction to employer's contributions. This will be adjustments to the Basic entitlement, lump sum, and FSM6 funding. Further details are available here: [Teachers' pension employer contributions funding adjustment: methodology - GOV.UK](#)
 - For early years providers the funding had been rolled into the early years block and was paid out as a quality supplement. The DfE has not yet published how this will be rolled back from 1st April 2027 in respect of the reduction to employer's contributions
- 12.5. **School Budget Support Grant 2026** – The DfE announced £770 million to support schools with the cost of pay awards. At the time of writing this report, the allocations have not yet been published. It is expected that they will be published and the grant paid to Local Authorities in October 2026. This will also be rolled into the National Funding Formula for 2027-28.

- 12.6. **Inclusive Mainstream Fund** – The DfE has allocated £1.6bn in funding over 3 years. The initial payment was made in July 2026. It has not yet been announced how future allocations will be made.
- 12.7. **Early Years Teacher's Pay Grant** – The DfE announced they were providing £18 million in additional funding in 2026/27 to support eligible public sector early years providers with the cost of the teacher's pay award 2026. This will be received by Waltham Forest in October 2026 and will be paid to providers as part of the hourly rate for the Autumn and Spring terms.
- 12.8. **Core School Budget Grant (CSBG)** – This grant provides funding for special and AP settings for the impact of previous teacher pay awards, employers' pension contributions and increased National Insurance employers' contributions. It was paid in 2025/26 and no announcements have been made for 2026/27 or 2027/28. Adjustments to previous amounts are likely due to the reduction in Employer's contributions for teacher pensions.

13. ANNEX A – 2027/28 School Funding Consultation

13.1. Minimum Funding Guarantee (MFG)

- 13.2. Local authorities (LA's) will continue to set a pre-16 MFG in their local formulae, to protect schools from excessive year on year changes. We expect to have the freedom to set the MFG in our local formula between -0.5% and 0.0% (in line with 2026/27). The purpose of the MFG is to protect the per pupil rate of funding for schools who would have otherwise seen a funding reduction due to changes in their pupil demographics (e.g. eligibility for free school meal or deprivation funding).

- 13.3. Last year, MFG was agreed at 0.0%

- 13.4. **Q: Do you agree that the rate of +0.0% should be applied for MFG for 2027/28?**

- 13.5. If not, please explain what MFG value you think should apply and why.

13.6. Split Site Funding

- 13.7. Split site funding provides additional funding to schools and academies that operate over two or more sites. These schools only receive one lump sum funding allocation, so a split site allowance is paid in addition to reflect that these schools have additional operating costs. The cost of the split site allowance is less than the value of a full lump sum. In 2026/27 twelve schools and academies received an allocation through this factor at a total cost of £0.997m. In 2027/28 only eleven schools will be eligible.
- 13.8. In 2026/27 the DfE continued to use a national formulaic approach to split sites funding, which replaced the previous local authority-led approach. The split sites factor is compulsory for all LA's, ensuring that split sites funding will be allocated consistently and fairly across the country. LA's are required to set

their split sites factor values within the 2.5% mirroring threshold for the NFF. It is unlikely that the DfE will change this for 2027/28.

13.9. The factor is made up of 2 parts, both of which are compulsory:

- basic eligibility funding: schools must be allocated a lump sum payment for each of their additional eligible sites
- distance funding: additional funding must be paid out on top of the basic eligibility lump sum for schools whose eligible sites are separated by more than 100 metres (by road distance) from the main site.

13.10. The LA expect to have some flexibility in the rates that can be applied for 2027/28 but only within the constraints of setting the rate within the allowable band. The allowable bands will not be known until the funding factor values are published.

13.11. As a guide the rates for 2026/27 were as follows:

	NFF Rate	Minimum Allowable	Maximum Allowable
	£	£	£
Split sites basic eligibility funding	59,668.34	58,176.63	61,160.05
Split sites distance funding	29,888.32	29,141.11	30,635.52
Total Split Site funding	89,556.66	87,317.74	91,795.57

13.12. The total funding allocation for 2026/27 under each of the options was:

	NFF Rate	Minimum Allowable	Maximum Allowable
	£m	£m	£m
Total Funding	£0.997	£0.981	£1.020

13.13. In 2026/27 the NFF rates were chosen.

13.14. **Q. How do you think the split site funding factor should be applied in LBWF for 2026/27?**

- Use the NFF funding rate
- Use the minimum allowable rate
- Use the maximum allowable rate

13.15. **Options to Manage Funding Pressures or Surplus**

13.16. There are several options available to manage the funding pressure/surplus in order to bring the overall cost of the school funding formula within the available funding allocation. These could include a simple reduction in the value payable

under particular factors of the formula (within the boundaries set by the DfE for LA's to move closer to the NFF values) or more targeted reductions.

13.17. In 2026/27 an adjustment to AWPU was the preferred option to manage the pressure.

13.18. **Q: Do you agree that adjustment to AWPU should be applied to manage any funding pressures?**

13.19. If not, what factors do you think should be adjusted?

Meeting / Date	SCHOOLS FORUM 21 October 2026	Agenda Item	7
Report Title	Education Services Grant for Maintained Schools 2026/27 and 2027/28 Proposal		
Decision/Discussion/ Information	For Decision by Maintained School members of Schools Forum (primary, secondary, special, and the PRUs only)		
Report Author/ Contact details	Jordan McDougall, Head of Finance Children's Services Jordan.mcdougall@walthamforest.gov.uk		

1. SUMMARY

- 1.1** This report updates the breakdown of the Education Services Grant for maintained schools.

2. RECOMMENDATION

2.1 Schools Forum to note:

2.1.1 The breakdown and use of the Education Services for maintained schools for 2026/27.

2.1.2 The breakdown and charges for the Education Services for maintained schools 2027/28.

2.2 Schools Forum (Maintained Schools only) to approve:

2.2.1 The de-delegation for the Education Services for maintained schools for 2027/28.

3. REASON

- 3.1** The Education Services Grant ceased in 2017-18. It comprised two elements: Retained Duties (for all schools and academies) funded at £15 per pupil and General Duties (for maintained schools only) funded at £77 per mainstream pupil and significantly more per place for the PRU and the maintained special school.
- 3.2** The Retained Duties funding was transferred to the Dedicated Schools Grant and now forms part of the Central School Services Block (CSSB) but the General Duties (known as Education Functions for maintained schools) funding ceased.

- 3.2** Education Functions comprise statutory and regulatory duties held by the local authority in respect of maintained schools, including Landlord duties, accountancy, internal audit and pension scheme administration. These are listed in greater detail in Appendix A.
- 3.3** Academies are required to perform these functions for themselves or pay their MATs to do so for them.
- 3.4** Over the last year, we have been strengthening processes and improving services to maintained schools. The Stronger Schools Financial Programme has improved the support and monitoring for schools in or approaching deficit. There have been a number of challenges in the administration of the Teachers Pension Scheme since the change of payroll providers in April 2025, and considerable work has been done to strengthen processes and communication with schools. Work in both of these areas is ongoing to drive continuous improvement.

4. BACKGROUND

- 4.1** Since 2017/18 Schools Forum has agreed that the LA retain centrally an amount per pupil from each maintained school to towards the costs of these services that maintained schools cannot perform for themselves. In 2026/27 the rate was maintained at £25 per pupil and created a budget of £474,225. This rate has not changed since 2023/24, however we are proposing to freeze the rate for another financial year. Due to falling rolls and academy conversions, the budget allocation created by the de-delegation has reduced year on year and has not kept pace with inflation and pay awards.
- 4.2** Falling rolls and academy conversions have eroded the income, however the LA is proposing to hold the rate at £25.00 per pupil for 2027/28. This represents less than 0.5% of any school's budget share (based on 2026/27 budget share and NOR) and will create an estimated budget of £467,600. The final budget will not be known until after NOR are confirmed through the 2027/28 APT.
- 4.3** LAs should set a single rate per 5- to 16-year-old pupil for all mainstream maintained schools, both primary and secondary.
- 4.4** As with de-delegation, the amount to be held by the local authority will be determined after MFG has been applied.
- 4.5** LAs can choose to establish differential rates for maintained nursery schools, special schools and PRUs, if the cost of fulfilling the duty is substantially different for these schools. The rate will be expressed per-place rather than per-pupil for special schools and PRUs. Waltham Forest has always used the same rate and intends to continue. The contribution from these settings adds an additional £5,025 taking the overall budget to £479,200 in 2026/27,

- 4.6** An illustration of the amounts proposed to be retained centrally from the budget share of each maintained school in 2027/28 is attached as Appendix C. These figures will be updated when the DFE releases the 2027/28 APT with the October 2026 census and the schools block budget allocations for 2027/28 are confirmed.
- 4.7** 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.
- 4.8** If a school converts to academy status, the ESFA will recoup the amount retained for that school from the local authority's DSG for the remaining months of the financial year that the school is an academy. The academy will be reimbursed in its monthly general annual grant (GAG) payment from the point of conversion.
- 4.9** Unlike for de-delegated services, there will be no phased transfer of funding following conversion so there will be immediate recoupment of this part of the budget.
- 4.10 Decision:** Does Schools Forum approve the LA retaining centrally a per pupil amount of £25.00 from the maintained schools' budget share with a matching per place amount applied to the maintained nursery schools, special school and the PRUS in financial year 2027/28?

Appendix A

London Borough Waltham Forest Council Maintained Schools Statutory and Regulatory Duties for Maintained Schools

Please note that the cost for each section may have costs other than staffing

Accountancy (Statutory Functions)

Description of Duties:

- Consolidation of school accounts into Council's year end statement of accounts.
- Overview of school budget submissions & budget monitoring reports.
- Monitoring of schools in financial difficulty/deficit.
- Monitoring adherence to Scheme for Financing Schools.
- Returns to Central Government – S251, RO/RA, CFO grants return.
- Administration of grants & other funding to maintained schools eg. PPG, budget allocations, and adjustments.
- Budgeting and accounting functions relating to maintained schools including Access Budget software

Cost: £172,300

1 FTE Principal Accountants; 0.50 FTE Finance Business Partner; 0.10 FTE Head of Finance: 1 FTE Schools Financial Support
Total FTE 2.6

Pension Scheme Administration

Description of Duties:

- Administration of Teachers pension schemes in relation to staff working in maintained schools:
- Amending and updating employee records in relation to pensions via MCR upload
- Preparation of End of Year Certificate
- Completion of statutory monthly returns to Teachers Pensions
- Duties related to the annual audit of the Teacher's Pension Scheme

Cost: £57,900

0.83 FTE Pensions Assistant

Internal Audit of Schools – Statutory Requirements

Description of Duties:

- Annual internal audit of maintained schools according to level of risk - circa 7-8 schools are audited per year. Each audit takes on average 10 working days. The audit covers Governance; financial planning and management; financial policy, processes and records; benchmarking and value for money; school fund, SFVS.
- Follow-up reviews for those schools that have a weak or very weak audit report opinion.

- Element of time for the planning and monitoring of the school visit programme and liaising with Accountancy /governor support etc on queries when they arise.

Cost: £92,000

0.75 FTE Internal Auditor; 0.60 FTE Senior Internal Auditor

School Improvement – Statutory Requirements

Description of Duties:

- Monitoring the administration of KS2 tests
- Understanding maintained school performance
- Identifying underperformance and working with schools where concerns arise
- Deciding whether formal intervention is required
- Exercising Statutory intervention powers including issuing warning notices where appropriate
- Administering the HEP contract

Cost: £65,000

0.5 FTE Assistant Director for Learning and Inclusion

Landlord Duties and Asset Management

Description of Duties:

- Building compliance and Planned Preventative Maintenance
- Ensuring appropriate facilities for staff and pupils
- Commission and deliver Legionella, Asbestos and Fire Safety Management and Condition Surveys
- Ensuring school-based staff have the correct competencies
- Providing Evolve software

Cost: £92,000

1 FTE Schools Asset Compliance Manager, 0.15 FTE Schools Asset Team Manager

Cost of Delivery in 2026/27 and Proposed Rates 2027/28

	2026/27 per pupil £	2026/27 £	2027/28 per pupil £	2027/28 Proposed £
Accountancy	8.99	172,300	8.99	165,725
Pension Scheme Administration	3.02	57,900	3.02	57,900
Internal Audit	4.80	92,000	4.80	92,000
School Improvement	3.39	65,000	3.39	65,000
Landlord Duties and Asset Management	4.80	92,000	4.80	92,000
Total Cost	25.00	479,200	25.00	472,625

Method of charging

The total net cost of the service was divided by the total number of pupils recorded in the October 2025 census to arrive at a per pupil amount for charging purposes. For 2026/27 this equated to £25.00 per pupil. Due to the conversion of Our Lady and St George to an Academy, overall pupil numbers have dropped and early indications of October 2026 census is a reduction in pupil numbers of 543. The final budget for 2027/28 will be updated to reflect the actual pupil census.

2026/27 Estimate uses 2025/26 Pupil Numbers and Pupil characteristics. It is a Base Line estimate only
Per Pupil Estimate uses October 2025 census

School Name	27/28 Estimate (Baseline: 26/27 Post MFG Budget)	NOR As at October 25	Per Pupil £25.00 for Services to Maintained Schools	MAX 0.5% of budget share
	£133,905,844	18,905.00	£472,625	0.35%
Chase Lane Primary School	£4,309,174.00	625.00	£15,625.00	0.36%
Whitehall Primary School	£2,522,683.14	411.00	£10,275.00	0.41%
Downsell Primary School	£2,798,492.40	356.00	£8,900.00	0.32%
Newport School	£4,505,943.34	790.00	£19,750.00	0.44%
Chapel End Infant School and Early Years Centre	£1,288,994.54	163.00	£4,075.00	0.32%
Edinburgh Primary School	£1,274,584.71	162.00	£4,050.00	0.32%
Greenleaf Primary School	£2,410,856.70	413.00	£10,325.00	0.43%
Handsworth Primary School	£2,321,394.31	419.00	£10,475.00	0.45%
Thorpe Hall Primary School	£2,120,111.09	333.00	£8,325.00	0.39%
The Winns Primary School	£3,669,018.31	616.00	£15,400.00	0.42%
Oakhill Primary School	£1,302,148.46	205.00	£5,125.00	0.39%
Henry Maynard Primary School	£4,101,058.94	714.00	£17,850.00	0.44%
South Grove Primary School	£3,018,999.89	430.00	£10,750.00	0.36%
Dawlish Primary School	£1,152,782.04	168.00	£4,200.00	0.36%
Gwyn Jones Primary School	£2,323,746.34	393.00	£9,825.00	0.42%
George Tomlinson Primary School	£3,030,618.65	515.00	£12,875.00	0.42%
Mission Grove Primary School	£4,254,189.94	687.00	£17,175.00	0.40%
Coppermill Primary School	£1,178,853.22	183.00	£4,575.00	0.39%
Stoneydown Park School	£3,576,299.44	604.00	£15,100.00	0.42%
Parkside Primary School	£3,741,937.64	616.00	£15,400.00	0.41%
The Jenny Hammond Primary School	£2,344,919.44	391.00	£9,775.00	0.42%
Ainslie Wood Primary School	£2,390,621.63	403.00	£10,075.00	0.42%
Barn Croft Primary School	£1,136,890.99	170.00	£4,250.00	0.37%
Chingford CofE Primary School	£2,325,588.99	404.00	£10,100.00	0.43%
St Mary's Catholic Primary School	£1,248,133.53	211.00	£5,275.00	0.42%
St Joseph's Catholic Junior School	£822,155.88	115.00	£2,875.00	0.35%
St Joseph's Catholic Infant School	£630,452.21	79.00	£1,975.00	0.31%
St Patrick's Catholic Primary School	£1,939,292.95	301.00	£7,525.00	0.39%
Frederick Bremer School	£8,126,179.83	894.00	£22,350.00	0.28%
Heathcote School & Science College	£8,103,382.15	902.00	£22,550.00	0.28%
Willowfield School	£8,784,080.69	1,025.00	£25,625.00	0.29%
Leytonstone School	£8,279,271.76	1,029.00	£25,725.00	0.31%
Walthamstow School for Girls	£7,233,820.29	898.00	£22,450.00	0.31%
Kelmscott School	£9,761,759.42	1,142.00	£28,550.00	0.29%
Holy Family Catholic School	£7,762,091.31	901.00	£22,525.00	0.29%
Buxton School	£8,115,315.68	1,034.00	£25,850.00	0.32%
Belmont Park		72.00	£1,800.00	
PRUs		131.00	£3,275.00	

Appendix C – Maintained Schools

Schools operational guide: 2026 to 2027, Updated 19 November 2025

50.2 Responsibilities held for maintained schools only

School improvement

- expenditure related to core school improvement activities of local authorities with respect to maintained schools (Schedule 2, paragraph 53)

Statutory and regulatory duties

- functions of local authority related to best value and provision of advice to governing bodies in procuring goods and services (Schedule 2, paragraph 58)
- authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Schedule 2, paragraph 59)
- monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Schedule 2, paragraph 60)
- internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of the Local Government Act 1972 for maintained schools (Schedule 2, paragraph 61)
- functions under regulations made under section 44 of the Education Act 2002 (Consistent Financial Reporting) in so far as the functions related to maintained schools (Schedule 2, paragraph 62)
- investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Schedule 2, paragraph 63)
- functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Schedule 2, paragraph 64)

- HR duties, including advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Schedule 2, paragraph 65)
- determination of conditions of service for non-teaching staff (Schedule 2, paragraph 66)
- appointment or dismissal of employee functions (Schedule 2, paragraph 67)
- consultation costs relating to staffing (Schedule 2, paragraph 68)
- compliance with duties under Health and Safety at Work etc Act 1974 (Schedule 2, paragraph 69)
- provision of information to or at the request of the Crown relating to maintained schools (Schedule 2, paragraph 70)
- school companies (Schedule 2, paragraph 71)
- functions under the Equality Act 2010 (Schedule 2, paragraph 72)
- establish and maintaining computer systems, including data storage (Schedule 2, paragraph 73)
- appointment of governors and payment of governor expenses (Schedule 2, paragraph 74)
- budgeting and accounting functions relating to maintained schools (Schedule 2, paragraph 75)
- retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Schedule 2, paragraph 77)

Education welfare

- inspection of attendance registers (Schedule 2, paragraph 80)

Asset management

- general landlord duties for all maintained schools (Schedule 2, paragraphs 78a & b (section 542(2)) Education Act 1996; School Premises (England) Regulations 2012) to ensure that school buildings have:
 - appropriate facilities for pupils and staff (including medical and accommodation)
 - the ability to sustain appropriate loads
 - reasonable weather resistance
 - safe escape routes
 - appropriate acoustic levels

- lighting, heating, and ventilation which meets the required standards
- adequate water supplies and drainage
- playing fields of the appropriate standards
- general health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974)
- management of the risk from asbestos in community school buildings
- Control of Asbestos Regulations 2012

Central support services

- clothing grants (Schedule 2, paragraph 54)
- provision of tuition in music, or on other music-related activities (Schedule 2, paragraph 55)
- visual, creative, and performing arts other than music (Schedule 2, paragraph 56)
- outdoor education centres (but not centres mainly for the provision of organised games, swimming, or athletics) (Schedule 2, paragraph 57)

Premature retirement and redundancy

- dismissal or premature retirement when costs cannot be charged to maintained schools (Schedule 2, paragraph 79)

Monitoring national curriculum assessment

- monitoring of National Curriculum assessments (Schedule 2, paragraph 76)

Therapies

- this is now covered in the high needs section of the regulations and does not require schools forum approval

Additional note on central services

Services set out above will also include administrative costs and overheads relating to these services (regulation 1(4)) for:

- expenditure related to functions imposed by or under chapter 4 of part 2 of the School Standards and Framework Act 1998 (financing of maintained schools), the administration of grants to the local

authority (including preparation of applications) and, where it is the local authority's duty to do so, ensuring payments are made in respect of taxation, national insurance, and superannuation contributions

- expenditure on recruitment, training, continuing professional development, performance management and personnel management of staff who are funded by expenditure not met from schools' budget shares and who are paid for services
- expenditure in relation to the investigation and resolution of complaints
- expenditure on legal services

Meeting / Date	SCHOOLS FORUM 21 October 2026	Agenda Item	8
Report Title	Growth Fund and Falling Rolls Fund 2026/27 Amendment		
Decision/Discussion/ Information	For Discussion and Decision by all		
Report Author/ Contact details	Jordan McDougall, Head of Finance Children's Services Jordan.mcdougall@walthamforest.gov.uk		

1. SUMMARY

- 1.1** This report sets updates the use of the Growth Fund and Falling Roll schemes for mainstream school places for 2026/27 and asks for an amendment to criteria.

2. RECOMMENDATION

2.1 Schools Forum to approve:

2.1.1 To amend the Growth Fund criteria according to the current Department for Education guidance to support mainstream LBWF schools that have received pupils following the partial or full closure of an existing mainstream school or academy.

2.1.2 The additional allocations following the amendment to the Growth Fund criteria and Lammas recoupment.

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** Unless a bulge class is created to take a school over its PAN, the current growth fund criteria doesn't make provision for schools admitting pupils following closure of another LBWF school, although this is allowed by the DfE criteria. I have confirmed with the DfE that a proposed amendment can be made by approval from Schools Forum.
- 3.3** LBWF finance met with the DfE to discuss the recoupment of the Lammas Secondary school following the planned partial closure in the Academic Year 2026/27 and full closure in 2027/28.

- 3.4** In consultation with the DfE the potential reduction to the Lammas recoupment was modelled which is a provisional amount of £1.1m. The final amount will not be determined until after the October 2026 census has been completed.

4. BACKGROUND

- 4.1** The criteria for use of LBWF Growth Fund has not been changed for several years and doesn't reflect all the current allowable uses of as set out in the DfE guidance. The Growth fund can also be used to:

- *Meet revenue costs, for schools, or removing or repurposing surplus school places*

- 4.2** The following criteria could be added to our Growth Fund policy:

- *Where one LBWF mainstream school or academy has partially or fully closed within the financial year, and pupils from closed year groups within that school have moved to an alternative Waltham Forest mainstream school as arranged by the admissions team, the receiving school will be funded for the remainder of the financial year at the current average per pupil rate of the closed school for all pupils.*

- 4.3** The DfE was contacted for comment. Advisors stated that even if Schools Forum agree criteria, it must still be compliant with DfE policy. The advisor confirmed that the basic principles outlined by this addition are acceptable.

- 4.4** Where parents have made in year admissions for pupils in year groups that have not yet closed, the school would not be eligible to receive any additional Growth Funding.

- 4.5** From the April of the following year the schools will receive funding through their Individual Budget Shares as the new pupils will have been counted in the October Census.

- 4.6** Due to the nature of lagged funding, the Growth Fund will continue to fund the 4 academy schools for the first 5 months of the 2027/28 financial year. This is modelled in the table below.

Revised Growth Fund	Additional	2026/27	2027/28
	Pupils	£	£
Lammas Closure			
Buxton Yr7 – bulge*		139,610	
Buxton Yr 10 – bulge*		152,650	
Connaught	20	120,217	85,869
Holy Family	24	144,261	
George Mitchell	5	30,054	21,467
South Chingford	10	60,109	42,935
Kelmscott	2	12,022	-
Norlington	3	18,033	12,880
Willowfield	1	6,011	-
Totals		682,966	163,152

4.7 Buxton Bulge classes – Buxton have accepted bulge classes which have taken them over PAN. As a result, they are being funded under the existing growth fund criteria.

4.8 The amount of the Lammas Recoupment is an estimate and will not be confirmed by the DfE until after January 2027.

4.9 Decision: Does Schools Forum approve the amendment to the Growth Fund criteria and the allocations to individual schools and academies?

Meeting / Date	SCHOOLS FORUM	Agenda Item	9
Report Title	Extension of SENIF funding		
Decision/ Discussion/ Information	For Discussion		
Report Author/ Contact details	Mary Jarrett: Corporate Director for Education. Mary.jarrett@walthamforest.gov.uk		
Appendices			

1. SUMMARY

- 1.1 This report sets out the Local Authority's intentions to create an extension of SENIF funding which is currently allocated for children until 1st January of their Reception year to extend until the end of their Reception year (July).
- 1.2 Therefore, SENIF funding will be available for children who are eligible (and subject to the existing review schedule) until they complete their Reception Year.
- 1.3 This report sets out the rationale for this proposal and costs with the implication for longer-term financial forecast and the alignment of this proposal to the SEND Reform agenda.

2 RECOMMENDATIONS

- 2.1.1 That the SENIF funding extension is implemented; so that children remain supported via SENIF at the levels agreed in Early Years until they complete their Reception Year.

3. REASON

3.1 The reasons for this recommendation are as follows:

- Children start their Reception year having been supported via a variety of settings and from very different backgrounds. Many children require time to adjust to school routine and to the demands of a classroom setting.

- The decision to assess and issue an EHCP is therefore often made at a point in time when the school does not know the child and the child has not adjusted to school.
- SENIF funding is less complex for schools to apply for and does not require EPS support (although for some children this may be necessary). It can support the additional staffing support required to structure and frame children's learning in Reception but does not involve creation of a statutory plan, which is harder to review, requires legally binding paperwork and which can quickly become out-dated, and the EHCP is often required solely for the purpose of additional support which can be better, and more quickly provided via the SENIF route.
- If SENIF funding is extended until the end of Reception Year this allows children at least half an academic year to adjust to school life, and also for school staff to understand the child's individual learning needs and therefore, ensuing EHCPs are likely to be both more accurate in their content and funded proportionate to the actual needs of the child, over time, rather than expedited at a point in time where a young child with additional needs is adjusting to a new environment.
- Local Authorities who have introduced this system (including Brent and Haringey) have reported better quality plans for younger children, reduced demands within the statutory SEND system and a reduction in allocated top-up funding over time as children's plans more accurately reflect their needs.

4. BACKGROUND

- 4.1 SENIF funding has been developed over time by Waltham Forest Early Years Team. The assessment process for SENIF is multi-disciplinary and is designed to increase the available support for children in Early Years settings to ensure that they are supported to meet their potential. [Applying for SENIF March 2026.pdf](#)
- 4.2 Evidence from Education practice suggests that the transition into school can often be difficult for children with identified special needs (i.e. those already allocated SENIF funding in Early Years).
- 4.3 Additionally, some children with obviously complex needs can arrive into primary schools without having been assessed and waiting for a statutory assessment can prevent schools from accessing additional support required at pace.
- 4.4 In Waltham Forest we currently have 106 children in Reception who are receiving SENIF funding. The estimated cost for the Autumn term is £268,533 which increases to £805,600 for the full year. There are an additional 40 pupils in Reception who have had EHCPs agreed who are now funded by the normal High Needs Block top up funding.
- 4.5 This cost will be offset by the reduction in EHCP top-up funding allocated for children in Reception Year. From previous insight 87% of children receiving SENIF in Reception receive EHCPs by the end of the Reception year. The benefits will be realised via better and more accurate statutory assessments as these will be made

when the child has settled in school and had access to early intervention services which will become increasingly available via Experts at Hand.

4.6 SENIF is allocated at a banding range from £6,650 - £13,850 pa depending on complexity of need.

4.7 Children with Level 3, 4 and 5 SENIF funding can go on to have EHCPs issued with the average cost of an EHCP equivalent to Level 4 funding (£9,500).

4.8 The issuing of an EHCP will not reduce the immediate costs of funding, which will be picked up from the High Needs Block, as it is assumed that these children do have SEND and will require additional support as indicated by their SENIF assessment.

4.9 The continuation of funding will reduce bureaucracy for Early Years staff, ensure that only the most complex children go on to be assessed for EHCPs (in line with the SEND reforms) and allow for preventative and purposeful interventions such as Speech and Language Support (delivered via the Experts at Hand funding) can take effect prior to issuing a long term and legally binding plan with stringent review requirements.

5. PREDICTED BUDGET FOR 2026-27

5.1 The estimated cost of extending SENIF funding throughout Reception is £805,600 (at an average cost of £7,600 per child). Based on the current cohort of children receiving SENIF support and applying the average annual EHCP cost of £13,746 per child, high-level modelling suggests that the equivalent cost of children progressing to EHCP-funded support could be approximately £646,000. This comparison indicates that the proposal is expected to be broadly cost neutral, with the potential for a reduction in expenditure of £109,000. It should be noted that actual EHCP costs vary according to individual levels of need and associated top-up funding, therefore future expenditure may be higher or lower than this estimate. This is modelled in the following tables.

5.2 In addition to the potential financial benefit, SENIF provides a more efficient and accessible funding mechanism for schools and settings, enabling support to be put in place more quickly without the need for a statutory plan. As set out elsewhere in this report, extending SENIF funding allows children additional time to settle into Reception and for needs to be assessed more accurately before consideration of an EHCP. This may reduce both the number of children requiring an EHCP and the level of funding required for those who do progress to a plan. Any impact on EHCP demand, top-up costs and overall High Needs expenditure will continue to be monitored through ongoing SENIF forecasting and budget monitoring arrangements.