



# Haverling

L O N D O N B O R O U G H

## SCHOOLS FUNDING FORUM AGENDA

**8:00am**

**Thursday  
17 October 2024**

**Rm 235 CEME,  
Rainham**

**Members 17: Quorum: 7**

**MEMBERSHIP:**

**Representative Groups**

**LA Maintained School Representatives:**

**Head Teachers (6):** Emma Allen, Special  
Kirsten Cooper, Primary  
Georgina Delmonte, Primary  
Hayley Durrant, Primary  
David Unwin-Bailey, Primary  
Hayley McClenaghan, Primary  
Chris Speller, Primary

**Governors (2):**

**Academy  
Representatives:**

**Primary (2):** Chris Hobson

**Secondary (3)** Neil Frost  
Scott McGuinness  
David Turrell

**Special (1)** Andy Smith

**AP Academy (1)** Tony Machin

**Non-School  
Representatives:**

**Early Years PVI Sector** Emma Reynolds  
(1)

**Post 16** Vacancy

**Decision Board** Vacancy

**Trade Unions (2):** Teachers – George Blake or John McGill  
Support Staff – Peter Liddle

For information about the meeting please contact: Hany Moussa  
[hany.moussa@haverinq.gov.uk](mailto:hany.moussa@haverinq.gov.uk)

**AGENDA ITEMS**

- 1 APOLOGIES FOR ABSENCE AND ANNOUNCEMENT OF SUBSTITUTE MEMBERS OR OBSERVERS**
- 2 CONSTITUTION OF HAVERING SCHOOLS FUNDING FORUM AND OPERATIONAL AND GOOD PRACTICE GUIDE -DRAFT** (Pages 1 - 32)
- 3 ELECTION OF CHAIR AND VICE CHAIR** (Pages 33 - 34)
- 4 TO AGREE THE NOTES OF THE MEETING HELD ON...**  
The notes are attached at Appendix A.
- 5 MINUTES FROM THE PREVIOUS MEETING 13 06 24** (Pages 35 - 40)
- 6 MATTERS ARISING**
- 7 EARLY YEARS FUNDING** (Pages 41 - 46)
- 8 SCHOOLS FUNDING BLOCK** (Pages 47 - 83)
- 9 HIGH NEEDS FUNDING** (Pages 84 - 90)
- 10 CENTRAL SCHOOLS SERVICES BLOCK (CSSB)** (Pages 91 - 93)
- 11 SCHEME OF FINANCING SCHOOLS, APPRENTICESHIP UPLIFT, GRANTS AND SURVEY.** (Pages 94 - 107)
- 12 NEXT MEETINGS**

**Schools Funding Forum, 17 October 2024**

The next meetings have been arranged as follows:

28th November 2024 (room 235)

16th January 2025 (room 233)

13th February 2025 (room 233)

12th June 2025 (room 235)

All meetings to be held at CEME at 8.00am.

**13 ANY OTHER BUSINESS**

**Zena Smith  
Democratic and Election Services Manager**



## Constitution of the London Borough of Havering Schools' Forum

### Background

1. **The London Borough of Havering Schools' Forum** (hereafter referred to as "the Forum") is established under Sections 47(1) and 47A of the **School Standards and Framework Act 1998**, and in accordance with the **Schools Forums (England) Regulations 2024 (SI 2024/66)**.
2. **Purpose of the Forum:**
  - The Forum's primary function is to advise and make decisions on specific financial matters between schools and the local authority. The Forum's operations must comply with relevant statutory regulations, including:
    - **The Schools Forum (England) Regulations 2012**
    - **School and Early Years Finance (England) Regulations 2024**
    - **School Budget Shares (Prescribed Purposes) (England) 2002**
    - **Schools Forum Operational and Good Practice Guide (2021)**
  - The Forum serves both a **decision-making and consultative role** in relation to schools' funding, as set out in the regulations mentioned above.

### A. Terms of Reference

#### 1.1 Status of the Forum

- The Forum operates under the **Schools Forum (England) Regulations 2012**, and provides advice to the local authority (LA) on matters related to school funding.

#### 1.2 Consultative Role

The Forum must be consulted annually on the following:

- Changes to the funding formula.
- Allocation of the Dedicated Schools Grant (DSG), including decisions on redistributions between blocks.
- Arrangements for special educational needs, early years funding, and high-needs central spend.
- Funding arrangements for pupil referral units (PRUs) and education for children educated outside of mainstream schools.

#### 1.3 Decision-Making Role

Forum members will **vote annually** on the following:

- **De-delegation of allowable central budgets** for mainstream maintained schools by the respective school phase representatives.
- **Allocation of the growth fund** and criteria for the use of the falling rolls fund.

- Proposals related to **centrally retained expenditure** from the schools' budget.
  - Revisions to the authority's **Scheme for Financing Schools**.
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## **B. Membership**

### **2.1 Composition**

- The Forum comprises **school members, academy representatives, and non-school members**, elected in proportion to the number of registered pupils. In accordance with **Regulation 5(4) of the 2024 Regulations**, the Forum will reflect proportional representation and include:
  - **16 school members** (Headteachers, Governors, and Early Years representatives).
  - **5 non-school members**, including diocesan representatives and an Early Years PVI Provider representative.

### **2.2 School Members**

- Representatives are elected from the following groups:
  - **Primary headteachers and governors.**
  - **Secondary headteachers and governors.**
  - **Special schools, nursery schools, academies, and PRU representatives.**
  - Elections will be conducted by each group following principles of transparency, proportionality, and fairness.

### **2.3 Non-School Members**

- Non-school members include representatives from the **Roman Catholic Diocese, Church of England Diocese, a Trade Union, and Non-School Post-16 education sector.**

### **2.4 Substitute Members**

- **Permanent substitutes** may be nominated for each representative group. Substitute members may attend meetings with full voting rights if their respective substantive members are absent.

### **2.5 Observers**

- Observers, including representatives from the **Education and Skills Funding Agency (ESFA)**, may be invited to attend meetings but will have no voting rights.
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## **C. Operating Conventions**

### **3.1 Meetings**

- The Forum must hold at least **four meetings annually**, with dates set at the start of each financial year. Meetings will be open to the public, and agendas and minutes will be published online as per the **Schools Forums (England) Regulations 2024** and best practices outlined in the **2015 Operational Guidance**.

### **3.2 Chair and Vice-Chair**

- The Forum must elect a **Chair and Vice-Chair** from its members, excluding LA officers and elected members. The Chair's term should not exceed two years unless the member is re-elected. Re-election for a further term is permissible if the member continues to be eligible.

### **3.3 Quorum**

- Meetings are **quorate when at least 40% of the total membership is present**. Decisions related to the schools' budget, including the funding formula, cannot be taken unless 40% of school members are present.

### **3.4 Voting Procedures**

- Each member holds **one vote**. Votes will be taken by a show of hands or named vote if meetings are virtual. Only school members and Early Years representatives are eligible to vote on matters concerning the funding formula.
- In the case of a tie, the Chair holds the **casting vote**.

### **3.5 Sub-Committees and Working Groups**

- The Forum may establish sub-committees or working groups as needed. These groups will report back to the full Forum for formal approval of their recommendations.

### **3.6 Conflicts of Interest**

- Any member with a **personal or prejudicial interest** in any item must declare it at the start of the discussion and abstain from voting on the matter. Substitute members without a conflict may be invited to attend in place of the conflicted member.

### **3.7 Expenses**

- The LA will maintain a budget for reimbursing reasonable expenses related to Forum attendance. **Supply cover expenses** may be claimed for headteachers if necessary for Forum participation.

### **3.8 Publicity**

- The Forum's decisions, agendas, and minutes must be made publicly available on the London Borough of Havering Council website, as required under the **2024 Regulations**.

### **3.9 Amendments to the Constitution**

- Any proposed amendments to this Constitution must be agreed upon by a **majority vote** of the Forum members, provided that the proposal is included in the meeting agenda. Changes that are inconsistent with the statutory regulations cannot be implemented.

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## **Conclusion**

This constitution reflects the requirements of the **Schools Forums (England) Regulations 2024** and is aligned with best practice guidelines from the **Schools Forums Operational and Good Practice Guide**

**(2015).** It ensures transparency, proportional representation, and effective decision-making in relation to schools' financial matters in the London Borough of Havering.

DRAFT



Education & Skills  
Funding Agency

# Schools Forum

## Operational and good practice guide

March 2021



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## Introduction

1. This guide is designed to provide local authority officers and schools forum elected members with advice and information on good practice in relation to the operation of schools forums.
2. It is organised in two sections:
  - section 1 provides information on the constitutional and organisational requirements for schools forums
  - section 2 covers a number of key aspects of the operation of schools forums at local level, drawing on good practice from a number of schools forums
3. GOV.UK contains details of all the announcements, documents and other information relating to school funding and schools forums, including the National funding formula (NFF) The website also has a range of useful links to other sites that may be of relevance to schools forum members.
4. A short [guide to the schools forum for schools and academies](#), which may be helpful to stakeholders and the wider school family, is available on GOV.UK.
5. If you have any queries about the operation of schools forums please contact Education and Skills Funding Agency (ESFA) using the [ESFA enquiry form](#).

## Section 1 – schools forum regulations: constitution and procedural issues

### Regulations

6. [National regulations](#)<sup>1</sup> govern the composition, constitution and procedures of schools forums. Local authorities can provide schools forum members with a copy of these regulations or alternatively they can be accessed at:

<http://www.legislation.gov.uk/ukSI/2012/2261/contents>.

7. The School and Early Years Finance (England) Regulations 2021 amended The Schools Forums (England) (Coronavirus) (Amendment) Regulations 2020 to make permanent provisions to enable schools forums meetings to be held remotely. This includes (but is not limited to) telephone conferencing, video conferencing, live webcast, and live interactive streaming. Where a schools forum decides to hold a public meeting by remote means only, the forum should provide support or make alternative arrangements so that any interested parties who do not have telephone or online access can attend virtual meetings.

### Schools forum powers

8. Schools forums generally have a consultative role. However, there are situations in which they have decision making powers. The respective roles of schools forums, local authorities and the DfE are summarised in [schools forum powers and responsibilities](#). The overarching areas on which schools forums make decisions on local authority proposals are:

- de-delegation from mainstream maintained schools budgets (separate approval will be required by the primary and secondary phase members of schools forum), for prescribed services to be provided centrally
- to create a fund for significant pupil growth in order to support the local authority's duty for place planning (basic need), including pre-opening and diseconomy of scale costs, and agree the criteria for maintained schools and academies to access this fund
- to create a fund for falling rolls for good or outstanding schools if the schools' surplus capacity is likely to be needed within the next three years to meet rising pupil numbers and agree the criteria for maintained schools and academies to access this fund

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<sup>1</sup> Schools Forums (England) Regulations 2012 (S.I. 2012/2261) (as amended)

- agreeing other centrally retained budgets, including for local authority statutory responsibilities (where these relate to maintained schools only, voting is by the primary, secondary, special and PRU members of schools forum)
- funding for central early years expenditure, which may include funding for checking eligibility of pupils for an early years place, the early years pupil premium and/or free school meals
- authorising a reduction in the schools budget in order to fund a deficit arising in central expenditure, or from de-delegated services, which is to be carried forward from a previous funding period in the 2018 to 2019 funding year the schools block is ring-fenced. Local authorities require schools forum approval in order to move up to 0.5% from the schools block to other blocks
- in each of these cases, the local authority can appeal to the Secretary of State if the schools forum rejects its proposal.

9. Local authorities should be aware that the provisions of the [Local Government Act 2000](#) restrict the delegation of local authority decisions to Cabinet, a member of Cabinet, a Committee of Cabinet or an officer of the Council, which would not include schools forums. As a result the local authority cannot delegate its decision making powers to schools forum, for example, decisions on the funding formula.

10. Regulations state that the local authority must consult the schools forum annually in connection with various schools budget functions, namely:

- amendments to the school funding formula, for which the voting is restricted by the exclusion of non-schools members except for PVI representatives
- arrangements for the education of pupils with special educational needs in particular the places to be commissioned by the local authority and schools and the arrangements for paying top-up funding
- arrangements for the use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the local authority and schools and the arrangements for paying top-up funding
- arrangements for early years provision
- administrative arrangements for the allocation of central government grants paid to schools via the local authority
- There's no specific definition of these consultation requirements over and above the wording in the regulations. It's a matter for the local authority to decide on the appropriate level of detail it needs to generate a sufficiently informed response from schools forum.

11. Consultation must also take place when a local authority is proposing a contract for supplies and services which is to be funded from the Schools Budget and is in excess of the EU procurement thresholds. The consultation must cover the terms of the contract at least one month prior to the issue of invitations to tender.

12. The schools forum has the responsibility of informing the governing bodies of all schools maintained by the local authority of the results of any consultations carried out by the local authority relating to the issues in paragraphs 12 and 13 above.

13. Local authorities will need to discuss with the schools forum any proposals that they intend to put to the Secretary of State to:

- vary the MFG
- use exceptional factors
- vary pupil numbers (Secretary of State approval is no longer required for increases relating to changes in admission limits or reorganisations)
- allow additional categories of, or spending on, central budgets
- amend the sparsity factor
- vary the lump sum for amalgamating schools
- vary the protection for special schools and special academies
- move up to 0.5% from the schools block, where the schools forum do not agree, or move more than 0.5% from the schools block

Proposals will then need to be considered by the Secretary of State.

## **Membership**

14. The Schools Forums Regulations provide a framework for the appointment of members, but allow a considerable degree of discretion in order to accommodate local priorities and practice. A quick guide to the [structure of the schools forums](#) is available.

15. There is no maximum or minimum size of a schools forum. Authorities will wish to take various issues into account in deciding the actual size, including the need to have full representation for various types of school, and the local authority's policy on representation of non-schools members. However, care should be taken to keep the schools forum to a reasonable size to ensure that it does not become too unwieldy.

16. Types of member: schools forums must have 'schools members', 'academies member(s)' if there is at least one academy in the local authority's area and 'non-schools members'. Schools and academies members together must number at least two-thirds of the total membership of the schools forum and the balance between maintained primary, maintained secondary and academies members must be broadly proportionate to the pupil numbers in each category, so the structure of Forum should be regularly reviewed, we would suggest good practice is to review the membership as a standing agenda item at each meeting. Academies members must represent mainstream academies and, if there are any in the local authority area, special academies and alternative provision academies. There is no requirement for academies members to represent specific primary and secondary phases, but it may be encouraged to ensure representation remains broadly proportionate to pupil numbers. Academy members must be separately elected and designated from maintained school representatives, please see paragraph 28.

17. Schools forum members will need the skills and competencies to manage Forum business (as detailed in [school forum powers and responsibilities](#)) and to take a strategic view across the whole education estate whilst acting as representative of the group that has elected them. Furthermore, they should be easily contactable and pro-active in raising the profile of issues and communicating decisions, and the reasons behind them, effectively. Good practice for schools forums would be to offer training to new or existing members who may benefit from this.

## Term of office

18. The term of office for each schools member and academies member should be stipulated by the local authority at the time of appointment. Such stipulation should follow published rules and be applied in a consistent manner between members. They need not have identical terms – there may be a case for varied terms so that there is continuity of experience rather than there being a complete change in the membership at a single point. The term of office should not be of a length that would hinder the requirement for the structure of the schools forum to mirror the type of provision in light of the pace of academy conversions. Examples of how this may work include:

- holding vacancies until the schools forum structure is reviewed providing that this does not mean holding vacancies for an unreasonable length of time, for example, we would expect this vacancy to be filled for the following term
- increasing the size of the schools forum temporarily to appoint additional academy members, then deleting schools member posts at the end of a term of office or when a vacancy arises
- considering continuity of service; where an academy conversion affects the school of a current schools member, would academies consider appointing that person as an academies member

19. The length of term of office for non-schools members is at the discretion of the local authority. Schools and academies must be informed, within a month of the appointment of any non-schools member, of the name of the member and the name of the body that that member represents.

20. As well as the term of office coming to an end, a member ceases to be a member of the Schools Forum if he or she resigns from the schools forum or no longer occupies the office by which he or she became eligible for election, selection or appointment to the schools forum. For example;

- a secondary schools member must stand down if their school converts to an academy
- a schools member representing community primary school governors who is no longer a governor of a community primary school in the relevant local authority must cease to hold office on the schools forum even if they remain a governor of a school represented by another group or sub-group
- other situations in which membership of the schools forum ends are if a member gives notice in writing to the local authority and, in the case of a non-schools member, the member is replaced by the local authority, for example at the request of the body which the member represents

## **Schools members**

21. Schools members represent specified phases or types of maintained schools within the local authority. As a minimum, schools forums must contain representatives of two groups of schools: primary and secondary schools, unless there are no primary or secondary schools maintained by the local authority. Middle schools and all through schools are treated according to their deemed status.

22. Where a local authority maintains one or more special schools the schools forum must have at least one schools member from that sector. The same applies to nursery schools and pupil referral units (PRUs).

23. The local authority then has discretion to divide the groups referred to in paragraph 16 and 17 into one or more of the following sub-groups:

- headteachers or headteachers' representatives in each group
- governors in each group
- headteachers or headteachers representatives and governors in each group
- representatives of a particular school category, for example, voluntary aided

24. Headteachers can be represented by other senior members of staff within their school. Governors can include interim executive members of an interim executive board. The sub-groups do not have to be of equal size; for example, there



may be more representatives of headteachers of primary schools than governors of such schools, or vice versa. The membership structure of the schools forum should ensure there is sufficient representation of each type of schools member in each group to ensure that debate within the schools forum is balanced and representative. As a minimum, there must be at least one representative of headteachers and one representative of governors among the schools members.

25. Whatever the membership structure of schools members on a schools forum, the important issue is that it should reflect most effectively the profile of education provision across the local authority to ensure that there is not an in-built bias towards any one phase or group.

## **Election and nomination of schools members**

26. The relevant group or sub-group is probably best placed to determine how their schools members should be elected.

27. It's good practice for those who draw up the scheme to ensure that a vacancy amongst a represented group would be filled by a nominee elected according to a process that has been determined by all those represented in that group, for example, community primary school headteachers, or secondary school governors, ensuring that everyone represented has had the opportunity to stand for election and/or vote in such an election. The process must be restricted to the group in question; a headteachers phase group could only vote as a whole for headteacher members if the voting excluded academies, as academies members form a separate group.

28. It's not appropriate for a single person to be elected to represent more than one group or sub-group concurrently, for instance, if they were a governor at a primary and secondary school. They can stand for election from either group but can be appointed to represent only one of those groups.

29. The purpose of ensuring that each group or sub-group is responsible for their election process is to guarantee that there is a transparent and representative process by which members of schools forums are nominated to represent their constituents.

30. Appropriate support to each group or sub-group to manage their election processes should be offered by the clerk of a schools forum, or the committee/democratic services of a local authority. This may just include the provision of advice but may also consist of providing administrative support in actually running the elections themselves.

31. As a minimum, we would recommend that the clerk of a schools forum make a record of the process by which the relevant schools within each group and sub-group elect their nominees to the schools forum and be able to advise the Chair

of the schools forum and local authority on action that needs to be taken, where necessary, to seek new nominees.

32. In determining the process by which elections should be operated it is perfectly legitimate for a local authority to devise, in consultation with their schools forum, a model scheme for the relevant schools within a group or sub-group to consider and be invited to adopt. However, such a model scheme cannot be imposed on that body of schools: adaptations and/or alternative schemes may be adopted. A single scheme need not be adopted universally.

33. Care should be taken to ensure that every eligible member of a group or sub-group has an opportunity to be involved in the determination of their group's election process, is given the opportunity to stand for election if they choose to do so, and is involved in the election of their representative(s).

34. It would not be compliant with the regulations for the steering committee or Chair of a 'parent' group simply to make a nomination to represent their group or sub-group on a schools forum. Schools members must be elected, subject to paragraph 39 below.

35. The local authority may set a date by which the election should take place and must appoint the schools member if the election has not taken place by that date. The person appointed should be a member of the relevant group.

36. We would recommend that any scheme takes into account a number of factors:

- the process for collecting names of those wishing to stand for election
- the timescale for notifying all constituents of the election and those standing
- the arrangements for dispatching and receiving ballots
- the arrangements for counting and publicising the results
- any arrangements for unusual circumstances such as only one candidate standing in an election
- whether existing members can stand for re-election

37. In the event of a tie between two or more candidates, then the local authority must appoint the schools member instead. The local authority may decide to appoint someone else rather than one of the candidates and might wish to take into account the experience or expertise of the individuals, and the balance between the different types of school represented on the schools forum.

## Election and nomination of academies members

38. Academies members must be elected by the proprietor bodies of the academies in the local authority's area, and they are probably best placed to determine the process. Academies members are there to represent the proprietor bodies of academies and are, therefore, not necessarily restricted to principals, senior staff or governors. The same factors should be taken into account as for the election of schools members, set out in paragraphs 28 to 39. For the avoidance of doubt, Free Schools, University Technical Colleges and Studio Schools are classed as academies for this purpose. There is no distinction between sponsored and converter academies.

39. There are three sub-groups for academy members: mainstream academies, special academies and alternative provision academies and it is for the proprietors of academies within each of these sub-groups to elect their representatives. It is not appropriate, therefore, for headteacher phase groups to determine representation unless the academy proprietors have agreed and even then the voting would need to exclude maintained school representatives. There is no requirement for academies members to be split into primary and secondary sub-groups. However, local authorities may wish to encourage academies to consider the pupil proportions across all academies when electing their representatives.

40. Where there is only one academy in a sub-group in the local authority's area, then their proprietor body must select the person who will represent them.

41. It is possible that a single person be appointed as an academies member to more than one schools forum, for example if an academy chain is located across multiple local authorities, providing they are elected on each occasion in accordance with the agreed election process for each separate schools forum.

42. As with schools members, the local authority may set a date by which the election should take place and must appoint an academies member if the election does not take place by that date, or if an election results in a tie between two or more candidates.

## Non-schools members

43. Non-schools members may number no more than a third of a schools forum's total membership (excluding observers, see paragraph 58). A representative of providers of 16-19 education must be elected from those providers. This includes those in the FE sector (FE and sixth form colleges) and other post-school institutions that specialise in special education needs (SPNs), where 20% or more of their students reside in the local authority's area. As with academies the providers are probably best placed to determine the election process.

44. The local authority must appoint at least one person to represent early years providers from the private, voluntary and independent (PVI) sector. Early years

PVI settings need to be represented because funding for the free entitlement for three and four year olds and eligible two year olds comes from the Dedicated Schools Grant, and all settings are funded through the Early Years Single Funding Formula (EYSFF).

45. Before appointing additional non-schools members to the schools forum, the local authority must consider whether the Church of England and Roman Catholic dioceses situated in the local authority's area; and, where there are schools or academies in the area with a different religious character, the appropriate faith group, should be represented on the schools forum. If diocesan authorities nominate members for appointment as non-schools members they may wish to consider what type of representative would be most appropriate, schools-based such as a headteacher or governor, or someone linked more generally with the diocese, for example a member of the education board.

46. It's also good practice for local authorities to ensure that the needs and interests of all the pupils in the local authority are adequately represented by the members of a schools forum. The interests of pupils in maintained schools can be represented by schools members. Some pupils in a local authority, however, are not in maintained schools but instead are educated in hospitals, independent special schools and non-maintained special schools. Certain types of non-schools members can play an important role in representing the interests of these groups of pupils. They can also play a role in representing the interests and views of the services that support those groups of vulnerable and at risk pupils who nevertheless are on the roll of maintained schools, such as looked after children and children with special educational needs.

47. The purpose of non-schools members is also to bring greater breadth of discussion to schools forum meetings and ensure that stakeholders and partners other than schools are represented. Organisations which typically provide non-schools members are trades unions, professional associations and representatives of youth groups. Parent groups could also be considered. However, as there are clearly limited numbers of non-schools members able to be on a schools forum, care should be taken to ensure that an appropriate representation from wider stakeholders is achieved.

## Other membership issues

48. There are three restrictions placed on who can be a non-schools member of a schools forum. The local authority cannot appoint:

- an elected member of the local authority who is appointed to the executive of that local authority (a lead member/portfolio holder) ('executive members')
- the Director of Children's Services or any officer employed or engaged to work under the management of the Director of Children's Services, and who does not

directly provide education to children (or manage those who do) ('relevant officer' (a) and (b))

- other officers with a specific role in management of and/or who advise on funding for schools ('relevant officer' part (c))

49. Schools forums have the power to approve a limited range of proposals from their local authority: the restrictions ensure that there is no conflict of interest between the proposing body (the local authority) and the approving body (the schools forum).

50. However, non-executive elected members and those officers who are employed in their capacity as headteachers or teachers and those who directly manage a service which provides education to individual children and/or advice to schools on, for example, learning and behavioural matters are eligible to be members of schools forums.

51. In the case of non-executive elected members, they may be a schools member (by virtue of them being a school governor), an academies member or a non-schools member. As a non-schools member they may be well placed to fulfil the broader overview and scrutiny role they have within the local authority in general.

52. However, the inclusion of non-executive elected members and certain officers is not a requirement. Many schools forums do not have such members on them and it is for each local authority and schools forum to consider how best to ensure the right balance of school and non-school representation on the schools forum, taking into account their local circumstances and preferences.

## **The role of executive elected members**

53. A schools forum needs to ensure that there are systems in place for executive members of the Council to be aware of its views on specific issues and, in particular, any decisions it takes in relation to the Schools Budget and individual budget shares.

54. Executive members with responsibility for education/children's services or resources of the local authority are able to participate in schools forum meetings. By doing so such elected members are able to contribute to the discussion and receive first-hand the views of the schools forum: it is clearly good practice for this to be the case and the regulations provide the right for executive members to attend and speak at schools forum meetings. However, there is no requirement for this to happen so at the very least there should be clear channels of communication between the schools forum and executive members. Communication may also be assisted if schools forum members attended relevant Cabinet meetings as members of the public, for example, when the funding formula is decided.

## Recording the composition of schools forums

55. Each local authority must make a written record of the composition of its schools forum detailing the numbers of schools members and by which group or sub-group they were elected, the number of academies members and the number of non-schools members, their terms of office, how they were chosen and whom they represent. This record should also indicate the term of office for schools and academies members. It would be helpful if this were published on the schools forum website so schools and wider stakeholders can easily find who their representatives are.

## Observers

56. The Regulations provide that the Secretary of State can appoint an observer to attend and speak at schools forum meetings, for example a representative from the Education and Skills Funding Agency (ESFA). This allows a conduit for national policy to be discussed at a local level and provide access for schools forum to an additional support mechanism, for example, where there are highly complex issues to resolve.

## Participation of local authority officers at meetings

57. Only specific officers can speak at meetings of the schools forum. These officers are:

- Director of Children's Services or their representative
- Chief Financial Officer or their representative
- any person invited by the schools forum to provide financial or technical advice
- any person presenting a paper to the schools forum but their ability to speak is limited to the paper that they are presenting

58. In the majority of cases schools forums are supported by a specific officer. In the course of their work, however, schools forums will be required to consider a whole range of issues and they may consider it appropriate that other officers attend for specific items of business. Where this is the case, the local authority should meet the schools forum's requests as far as possible. It is best practice to record attendance at meetings as well as membership to ensure elected members are attending and contributing to discussions.

## Procedures

59. Many procedural matters are not prescribed in the regulations and are at the discretion either of the local authority or the schools forum itself. However, there are requirements in the regulations relating to:

- **Quorum:** A meeting is only quorate if 40% of the total membership is present (this excludes any observers, and it is 40% of the current membership excluding vacancies). If a meeting is inquorate it can proceed but it cannot legally take decisions (election of a Chair, or a decision relating to funding conferred by the funding regulations). An inquorate meeting can respond to local authority consultation, and give views to the local authority. It would normally be good practice for the local authority to take account of such ‘unofficial’ views, but it’s not legally obliged to do so. In practice, the arrangements for meetings should be made to reduce the chance of a problem with the quorum. The quorum stipulation is in the regulations to help ensure the legitimacy of decisions
- **Election of a Chair:** Under the Regulations, if the position of Chair falls vacant the schools forum must decide how long the term of office of the next Chair will be. This can be for any period, but the schools forum should consider carefully whether a period exceeding two years is sensible. A long period will also cause problems if the member elected as Chair has a term of office as a member which comes to an end before their term of office as Chair ends. The schools forum must elect a Chair from amongst its own members, so it is not possible to elect an independent Chair. In addition any elected member of the local authority or officer of the local authority who is a member of a schools forum may not hold the office of Chair. Schools forums can also appoint to a position of vice Chair to provide cover if the Chair is absent or the post vacant
- **Voting procedures:** The Regulations provide that a schools forum may determine its own voting procedures save that voting on:
  - the funding formula is limited to schools members, academies members and PVI representatives
  - de-delegation is limited to the specific primary and secondary phase of maintained schools members
  - retaining funding for statutory duties relating to maintained schools only is limited to maintained primary, secondary, special and PRU members
- **The powers which schools forums:** have to take decisions on a range of funding matters increase the importance of clear procedures, for example, decisions are made on a simple majority or the threshold to be met if higher. These procedures should take account of any use of working groups by the schools forum, for example a decision might be taken by voting to accept and adopt a report by a working group (see paragraph 65). As part of any voting



procedure there should be clarity in the procedures for recording the outcome of a vote, and any resolutions a schools forum makes in relation to any vote taken

- **Substitutes:** the local authority must make arrangements to enable substitutes to attend and vote (where appropriate) at schools forum meetings. This applies to schools members, academies members and non-schools members. The arrangements must be decided in consultation with schools forum members
- **Defects and vacancies:** The Regulations provide that proceedings of the schools forum are not invalidated by defects in the election or appointment of any member, or the appointment of the Chair. Nor does the existence of any vacancy on the schools forum invalidate proceedings (see paragraph 61 on quorum)
- **Timing:** schools forums must meet at least four times a year
- **Meeting:** schools forums can meet remotely. This includes (but is not limited to) telephone conferencing, video conferencing, live webcast, and live interactive streaming.

60. Where the regulations make no provision on a procedural matter, local discretion should be exercised. It is for the local authority to decide how far it wishes to establish rules for the schools forum to follow, in the form of standing orders. While it is entitled to do so, it is of course good practice to allow the schools forum to set its own rules so far as possible.

## Public access

61. Schools forums are more than just consultative bodies. They also have an important role to play in approving certain proposals from their local authority and are therefore involved in the decision making process surrounding the use of public money at local level. As a result schools forums are required to be open to the public. Furthermore papers, agendas and minutes must be publicly available well in advance of each meeting. It's good practice that notification that the schools forum is a public meeting is included on the website and papers are published at least a week in advance. Local authorities should ensure that the websites are accessible and easy to find.

62. Some schools forums already operate very much along the lines of a local authority committee. This is perfectly legitimate and will provide a consistent framework for the running of meetings that are open to the public, and the publishing of papers and agendas well in advance of the meeting and minutes published promptly as required under Regulation 8(13) of the Schools Forum Regulations 2012.

63. Local authorities should ensure that their schools forum clerk's contact details are published on their website and that it is clear to interested parties how they can attend the meeting remotely.



## Working groups

64. It's open to a schools forum to set up working groups of members to discuss specific issues, and to produce draft advice and decisions for the schools forum itself to consider. The groups can also include wider representation, for example, an early years reference group can represent all the different types of provider to consider the detail of the early years single funding formula. The reference group would then be able to give its considered view on the local authority's proposals to the schools forum. The schools forum should not delegate actual decisions or the finalisation of advice to a working group, as this may have the effect of excluding legitimate points of view. These have proved effective for larger local authorities; examples of some working groups are for high needs and early years.

## Urgent business

65. It's good practice for the local authority to agree with its schools forum an urgency procedure to be followed when there is a genuine business need for a decision or formal view to be expressed by the schools forum, before the next scheduled meeting. The local authority may of course call an unscheduled meeting; but it may also wish to put in place alternative arrangements such as clearance by email correspondence or some other means. Such instances should be avoided so far as possible but are legitimate provided all members of the schools forum have an opportunity to participate, the logistics provide a reasonable opportunity for consideration and the local authority policy on data security is not compromised.

66. It's not legal for the Chair to take a decision on behalf of the schools forum, no matter how urgent the matter in question; but a schools forum may wish to put in place a procedure for the Chair to give the local authority a view on an urgent issue.

## Resources of the schools forum

67. The costs of a schools forum fall in the Central School Services Block of the Dedicated Schools Grant (DSG).

68. It's legitimate to charge the running costs of schools forums to this budget including any agreed and reasonable expenses for members attending meetings, the costs of producing and distributing papers and costs room hire and refreshments and for clerking of meetings. Beyond these costs some schools forums have a budget of their own to use for activities such as commissioning research or other reports.

## Section 2 – effective schools forums

### Introduction

69. As the previous section outlined, local authorities have responsibility for establishing schools forums. They also have an ongoing responsibility to provide them with appropriate support, information and guidance in carrying out their functions and responsibilities.

70. The following outlines some aspects of what local authorities and schools forums should consider in ensuring that their schools forums are as effective as possible. The pace of academy conversions in particular means that this significant sector must be properly represented and feel that it is able to play a meaningful part in the discussions of the schools forum.

71. Central to the effectiveness or otherwise of a schools forum will be the relationship between it and its local authority. The local authority will have a significant influence on this: the support it provides; the resources it devotes and the weight it gives to the views of schools forums all contribute to the nature of the relationship. There are therefore a number of characteristics of this relationship that are particularly important:

- partnership: having a shared understanding of the priorities, issues and concerns of schools, academies and the local authority
- effective support: the business of the schools forum is supported by the local authority in an efficient and professional manner
- openness: it's important that a schools forum feels it is receiving open, honest and objective advice from its local authority
- responsiveness: local authorities should as far as possible be responsive to requests from their schools forums and their members. Schools forums themselves should also be aware of the resource implications of their requests
- strategic view: members of schools forum should consider the needs of the whole of the educational community, rather than using their position on a schools forum to advance their own sectional or specific interests
- challenge and scrutiny: schools forums may be asked to agree to proposals from their local authority that will have an effect on all schools and academies in the local area. The extent to which schools forums can scrutinise and challenge such proposals is an important aspect of their effectiveness

72. The characteristics identified above are just some of the aspects that will contribute to an effective schools forum. The following provides more detail on some of the specific issues that local authorities and schools forums may wish to consider in thinking about their own arrangements.

## Induction of new members

73. When new members join the schools forum appropriate induction materials should be provided. These might include material relating to the operation of the schools forum together with background information about the local and national school funding arrangements. Typically they might comprise:

- the constitution of the schools forum
- a list of members including contact details and their terms of office
- any locally agreed terms of reference explaining the relationship between the schools forum and the local authority
- copies of minutes of previous meetings
- the programme of schools forum meetings for the year
- the local schools forum web address

74. This Operational and Good Practice Guide, suitably supplemented by local material, should also be provided to new members on their appointment.

75. Where there is sufficient turnover of schools forum members in any particular year the local authority may wish to organise a one-off induction event to brief new members. Such an event would usefully include an outline of the role of the schools forum and the national funding arrangements for schools and local authorities. It might also include an explanation of the local funding formula and any proposals for review. The opportunity could also be taken to explain the main reporting requirements for school and local authority expenditure.

## Training

76. Ideally schools forum members should be able to use some of the budget set aside for schools forum running costs for accessing relevant training activities. Some training will be provided by officers of the local authority but members may wish to attend national or regional events, the costs of which, where necessary, can be supported from the schools forum budget. Local and national bodies have a key role to play in developing the competencies of forum members.

77. Training will need to be provided in response to any changes in the role of the schools forum and national developments in respect of school funding, to ensure that members can be fully effective when detailed discussions are taking place.

## Agenda setting

78. The process by which the agenda for a meeting or cycle of meetings is set is in many respects one of the key determinants of the effectiveness or otherwise of a schools forum.

79. The frequency and timing of meetings of the schools forum should be agreed in advance of each financial or academic year; these should take into consideration deadlines for the local authority such as disapplication requests and the submission of the authority proforma tool (APT). It's good practice to publish the dates of meetings on the schools forum website. In drawing up this cycle of meetings, in consultation with the schools forum, the local authority should provide a clear overview of the key consultative and decision-making points in the school funding cycle. These will be drawn from a combination of national and local information and should inform the basic agenda items that each meeting needs to cover. For instance meetings will need to be scheduled at appropriate points to enable the schools forum to consider the outcomes of local consultations and national announcements.

80. Although the business of schools forums must be open and transparent, it is recognised that from time to time items of a confidential nature will need to be discussed. It's recommended that authorities apply the same principles that they apply to Council or Cabinet meetings when judging an item to be confidential and adopt similar practices for dealing with those reports in the meeting, for example placing them together at the end of the agenda.

## Preparation for a schools forum meeting

81. It's vital that the schools forum is transparent, open and has clear communication lines to all of the members that are represented. This ensures the wider school family are aware of the business discussed, the impact on their setting and the reasons for the decisions.

82. The vast majority of a schools forum's business will be transacted on the basis of prepared papers. It is therefore important that these are concise, informative and produced in a timely and consistent manner. Recommendations should be clearly set out at the beginning of each report. It's also helpful if the front of the report confirms whether the report is for information or decision and who is eligible to vote where relevant.

83. It's good practice for the schools forum and local authority to agree a standard for papers. It is usual for papers to be dispatched at least one week prior to the meeting at which they will be discussed to allow members to consider them and if necessary canvass views from the group they are representing. Papers should be published on the local authority's website at this time to enable representations to be made to schools forum members.

84. Consistency in the presentation of papers also contributes to the effectiveness of meetings: it helps set the tone of meetings, facilitate the engagement of all members and signal the importance the local authority attaches to the work of the schools forum. Ideally such a standard should be agreed between the schools forum and local authority. The publishing of papers as a single pdf file is helpful as it saves time and avoids accessing multiple documents both in advance of, and during, the meeting. An Executive Summary of the reports can provide schools forum members and members of the public with an overview of the agenda and the decisions required.

85. The publishing of papers on a publicly available website well in advance of the meeting ensures that all interested parties are able to access papers. Some schools forums ensure that each represented group meets in the days immediately prior to the schools forum meeting to ensure the agenda is discussed and schools forum members are properly briefed by the group they represent. Although on occasions it's inevitable that schools forums will receive late, or tabled reports it does create some difficulty for members as they will not have been able to seek the views of those they represent.

86. Schools forums can consider adopting a flexible arrangement for time immediately prior to the meeting. For example it could be used for training of new members, or as a drop-in session for members to ask items of clarification, or for members to meet without officers to discuss the agenda.

## **Chairing the schools forum**

87. The Chair of a schools forum plays a key role in setting the tone, pace and overall dynamic of the schools forum. They should provide an environment within which all members are able to contribute fully to discussions and guide the schools forum to making well informed decisions.

88. The relationship between the Chair and the local authority is therefore vital. The Chair should be very clear on the substance of the agenda items, understand the issues involved and the decisions and/or actions that need to be taken in respect of School Forum business. It's good practice for there to be a pre-meeting between the senior officer of the local authority supporting the schools forum and the Chair of the schools forum to ensure that all the issues are clearly understood.

89. Equally, the Chair has the responsibility of representing the views of the schools forum back to the local authority: for instance, they should, where appropriate, take the initiative to make suggestions for improvements to the way the business is conducted, and, in exceptional cases and with support of the members of the schools forum take the view that they do not have sufficient information on which to base a decision and ask that an item is deferred until further information is available. However, in doing so, the Chair and schools forum should be fully aware of the consequences of deferral.

90. The independence of the schools forum is paramount. Enhancing the role of Chair to a paid position, rather than the reimbursement of reasonable expenses, could blur the lines of independence. Similarly, if the Chair undertakes significant work for the local authority in another capacity, for example as an external consultant, they could be viewed as equivalent to an officer of the local authority.

91. Local authorities could consider if sharing contact details of the schools forum Chair with neighbouring authorities would be helpful for peer support and improving networking opportunities.

## **Clerking the schools forum**

92. Clerking of a schools forum should be seen as more than just writing a note of the meeting. A good clerk provides an invaluable link between the members of the schools forum, the Chair and the local authority. It's a role often undertaken by an employee of the local authority though we would recommend consideration is given to the use of an independent clerk.

93. Clerks should manage the logistics of the meeting in terms of ensuring dispatch of papers and producing a note from the meeting. In considering the style of meeting notes consideration should be given to making them intelligible enough for non-attendees to get a sense of the discussion as well as clearly indicating the conclusion and action agreed in relation to each agenda item. Verbatim reports of a schools forum's discussion, however, are unlikely to be very useful. Schools forums may consider whether a simple action log should be maintained by the clerk to ensure all action points agreed are followed up.

94. Beyond this a good clerk can:

- provide the route by which schools forum members can access further information and co-ordinate communication to schools forum members outside of the formal meeting cycle
- respond to any queries about the business of the schools forum from headteachers, governors and others who are not on the schools forum themselves
- be responsible for ensuring contact details of all members are up to date
- maintain the list of members on the schools forum and advise on membership issues in general
- assist with the co-ordination of nomination or election processes run by the constituent groups
- keep the schools forum website up to date, for example by posting latest minutes and papers

- monitor, on a regular basis, the schools forum and general schools funding pages on the GOV.UK website; and arrange for the distribution of any relevant DfE information to schools forum members
- if appropriate, provide technical advice in relation to the schools forum regulations and in relation to the operation of a schools forum’s local constitution
- organise, operate and record any voting activity of the schools forum in line with the provisions of its local constitution

95. Not all of these tasks may be able to be undertaken by the schools forum clerk. However, each one is important and there should be arrangements in place to ensure they are discharged adequately.

## **Good practice for schools forum meetings**

96. Schools forums should ensure there is a clear debate of all agenda items. Whilst sub-group meetings are valuable in working through detailed issues, schools forums should consider that the level of debate held at the schools forum meeting and recorded in the minutes will be the official reflection of the level of challenge and discussion on each issue.

97. The use of nameplates for schools forum members also showing which group they are representing can be helpful to members of the public and presenters of papers. In addition the use of coloured cards or coloured nameplates can be helpful when specific members of a schools forum are eligible to vote on specific items, for example, voting on de-delegation or changes to the funding formula.

98. Consultations with the schools forum are a key responsibility of a local authority, ranging from the funding formula to the letting of contracts. Each consultation will be different and depend on the subject being consulted on, but local authorities should consider the following factors as good practice for effective consultation:

- plan and consult early
- allow reasonable timescales for response (as Forum members may need to consult the groups they represent)
- an open and honest approach
- fully inclusive
- allow for ongoing dialogue
- provide feedback



- clear communications

## Meeting notes and recording of decisions

99. A vital part of the effective operation of a schools forum is to ensure that an accurate record of the meeting is taken. This must include the clear recording of votes where there are contrary views. Recommendations to, and decisions of, schools forums must be clearly set out.

100. Notes or minutes of each schools forum meeting should be produced and published on the local authority website as soon after the meeting as possible to enable members and others to see the outcome of any discussions and decisions and/or votes. It is good practice to formally agree the accuracy of the note and minutes at a subsequent meeting but the publication of the draft minutes should not be delayed as a result. We would recommend that a log of the decisions is published within three working days of the meeting, and the draft minutes within 10 working days so that interested parties can access them and consult on them, if necessary, before the next meeting.

101. In order to provide clarity about representation at each meeting, it is good practice for the minutes to record the group and/ or subgroup that each member represents against their name.

## Communication

102. Communication to the wider educational community of the discussions and debates of, and decisions made by, the schools forum is fundamental to their effective operation. The more schools and other stakeholders know about the proceedings of the schools forum, the more their work will be an important and central part of the context of local educational funding. This is particularly important given the decision making role that the schools forum has. Local authorities should consider the operational differences between the types of stakeholders and plan their communications accordingly. For example ensuring effective communications across the PVI sector may be more difficult than with schools, which are more likely to have existing channels of communication for example, headteacher meetings.

103. Each schools forum should therefore be clear what its channels of communication are. It is fundamental that each member of schools forum represents the views of the group or sub-group that they represent and that all those with an interest in funding work together to ensure that their views are taken into account. Therefore communications directly between members and those they represent is essential; professional associations and phase groups could be suitable channels. This will ensure that schools forum members have an ongoing dialogue with the constituents of their group or sub-group and are therefore well able to represent their



views at schools forum meetings. However, the schools forum should also consider additional communication processes. These could include:

- drawing schools' attention to the fact that all its agendas minutes and papers are publicly available on the local authority's website (this should include the publication of formula consultation documents)
- an annual report on the proceedings of the schools forum
- attendance by the Chair, or other schools forum member, at other relevant consultative or management groups such as any capital working group; or senior management meetings of the Children's Services Department
- a brief email to all schools, early years providers and other stakeholders after each schools forum meeting informing them of the discussions and decisions with a link to the full papers and minutes for further information
- a schools forum newsletter can be a less formal and more interesting way of communicating forum business and raising the profile of the schools forum and its members

## **News updates**

104. Most, but not all, members of the schools forum will already be in receipt of regular information on school funding matters from the local authority and DfE. Other schools forum members should be copied into such information flows so that they can be kept abreast of developments between meetings.

105. Many local authorities have already established dedicated schools forum websites on which they post key information for schools forum members and other interested parties and updated on a regular basis.



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## Schools Funding Forum 17th October 2024

## ITEM 2

**Subject Heading:**

**Election of Chair and Vice Chair, and  
School Forum Constitution**

**Report Author:**

**Hany Moussa – Principal Education  
Finance Officer**

**Eligibility to vote:**

**All members**

### SUMMARY

This report outlines the requirements for election of the Chair and Vice Chair for Schools Forum, and an update to the Constitution for the Schools Forum.

### RECOMMENDATIONS

That the Schools Funding Forum:

- (i) Elect a Chair and Vice Chair from its members, excluding LA officers and elected members, to preside over Schools Forum meetings for the academic year 2024-25
- (ii) Notes the Constitution document and suggest amendments for finalisation for the updated Constitution for Schools Forum

### REPORT DETAIL

#### 1. Election of Chair for the Academic Year 2024-25

- Nominations for the role of Chair
- Election of the Chair by members
- Newly elected Chair assumes the role

## 2. Election of Vice Chair for the Academic Year 2024-25

- Nominations for the role of Vice Chair.
- Election of the Vice Chair by members.

## 3. Draft Constitution of the London Borough of Havering Schools' Forum

In line with the DfE's Schools Forum Operational and good practice guide (March 2021) (**Appendix B**), the Local Authority is updating the constitution of the Schools Forum and a draft version of the Constitution is provided in **Appendix A**.

School Forum member views is welcomed to the draft version of the Constitution, and suggested amendments, in advance on next steps before the Constitution is formally adopted.

# Agenda Item 5

## MINUTES OF A MEETING OF THE HAVERING SCHOOLS FUNDING FORUM

Thursday 13<sup>th</sup> June 2024 at CEME.  
(8.00 – 9.15 am)

**Present: Representative**

**Groups**

**LA Maintained School Representatives:**

**Primary:** Kirsten Cooper (Chair)  
Georgina Delmonte  
Hayley Durrant  
Hayley McClenaghan (HMc)  
Chris Speller  
David Unwin-Bailey (DUB)

**Academy Representatives:**

**Primary:** Chris Hobson

**Secondary** Neil Frost  
Scott McGuinness  
David Turrell (Vice Chair)

**Alternative Provision:** Tony Machin

**Non-School Representatives:**

**Early Years PVI Sector:** Bev Nicholls

**Trade Unions:** John McGill (JM) (Teaching staff union representative)  
Peter Liddle (Support staff union representation)

**Non Members in attendance:**

|                          |   |
|--------------------------|---|
| Angela Adams             | Clerk, HGS                                    |
| Trevor Cook (TC)         | Assistant Director of<br>Education            |
| Katherine Heffernan (KC) | Head of Finance (Business<br>Partnering)      |
| Hany Moussa (HM)         | Principal Education Finance<br>Officer        |
| Jacqueline Tracey        | Senior Inspector (Schools<br>Causing Concern) |

**1. APOLOGIES FOR ABSENCE AND ANNOUNCEMENT OF SUBSTITUTE MEMBERS  
OR OBSERVERS**

All were welcomed to the meeting.

Apologies for absence had been received from Emma Allen, Denise Broom and Marcus Bennett. It was noted that Bev Nicholls was attending on behalf of Emma Reynolds.

## **2. TO AGREE THE MINUTES OF THE MEETING HELD ON 8<sup>th</sup> FEBRUARY 2024.**

The minutes of the meeting held on 8<sup>th</sup> February 2024 were received and agreed.

## **3. MATTERS ARISING**

There were no matters arising that were not included elsewhere on the agenda.

## **4. DEDICATED SCHOOLS GRANT (DSG) YEAR END BALANCE 2023 -24**

**Forum members were asked to:**

- 1. Note the areas of underspend from the 2023 -24 Dedicated Schools Grant.**
- 2. Agree the allocation of funding in the financial year 2024 -25 as set out in the proposals circulated in advance of the meeting.**

Balance carry forward from 2023 -24 was in line with forecast but the final position was subject to audit. The cumulative deficit carry forward for DSG was £15.296m, due to the high needs costs rising faster than the funding. The figures had been revised since the paper was published and the updated figures would be circulated.

**ACTION: HM / HGS**

Any surpluses would be used to offset the deficit in high needs including the pupil growth / falling rolls funding but excluding Early Years surpluses.

Underspends in early years funding would normally be discussed further with Early Years Provider Reference Group, however as the amount was immaterial, the decision was referred to Schools Forum.

School support practitioners' funding was underspent due to them being under staffed, any surpluses would be used to offset the deficit in High Needs.

Maternity costs and claims were less than the previous year so there was an underspend of £74k. Attendance and Behaviour service which was for School support practitioners', underspent by £46k due to the service being under staffed and not at full capacity. It was proposed that any surpluses would be used to offset the deficit in High Needs.

For Trade Union de-delegated funding, it was proposed to carry forward the balance of £26k, in order to meet the costs of the TUFT representatives to support schools. The underspend in the for Growth Fund was due to bulge classes originally included in the forecast not needed. Primary Fair Access Panel (FAP) currently met every 2 weeks and a different way of funding FAP and bulge classes next academic year was being considered.

De-delegated funding was managed and reviewed to ensure it stayed in line with the budget de-delegated, it was also discussed at the Chairs and Reps meetings.

High Needs were in deficit by £16.118m, this was made up of a carry forward deficit of £8.523m from 2022-23 and deficit of £7.595m from 2023-24. With the allocation of the underspend from the other de-delegated budgets being moved to high needs, this reduced the deficit to £15.322M.

**Forum members noted the areas of underspend from the 2023-24 Dedicated Schools Grant.**

**Forum members all agreed the allocation of funding in the financial year 2024-25 as set out in the proposals circulated in advance of the meeting.**

## **5. LA MAINTAINED SCHOOLS' BALANCES 2023-24**

**Forum members were asked to note the report**

Forum members noted that at the end of the 2023-24 financial year the overall total deficit for maintained schools in the Borough was £3.6m and the overall surplus was £5.4m, leaving a net balance of £1.8m. There were 8 schools who had been in deficit for more than 5 years.

Forum members noted that there was no additional funding available for schools facing financial difficulty, they needed to draw up a recovery plan to manage the deficit. A new member of staff would be joining the finance team in July and they would be supporting schools with their recovery plans. Forum members also questioned if school to school support could be considered, where by another Headteacher alongside the Local Authority support a school with their recovery plans.

A forum member questioned how many schools were in deficit due to Special Education Needs (SEN) costs. In response it was noted that this was being reviewed, it was acknowledged that there was a direct correlation between the high needs spend and the deficits. School to school support would need to be benchmarked but it would be a supportive measure as another Headteacher would bring an educational insight, act as a sounding board and support collaboratively. It was also stated that not all schools took a significant share of high needs pupils. Funding was not there to reduce the deficits but it was noted that plans were needed to reduce the deficit. There were regulations to meet.

Forum members advised that the number of SEN pupils at schools and the number of staff at each school would be useful to look at so that it could be identified if schools were underfunded for SEN which then led to a deficit. It was stated that they could not continue funding at the full rate.

The unfunded pay increments for support staff and increase by 5% in pension contributions, which was also unfunded, also impacted the schools' budgets. These had not been funded to the extent that schools would like. For some schools staffing costs now accounted for 89% of the General Annual Grant (GAG).

Forum members were reminded that the Local Authority had taken out a capitalisation loan to balance the books, so it had to be demonstrated that schools were not wasting money.

Forum members stated that savings were small but not significant and they were not



wasting money. New ideas had to be managed carefully but there was less money to balance the books.

TC advised that issues had been identified – support and high needs- so delivering better value had been applied for and awarded. SEN would continue to impact schools as parents were able to choose the school, this was a huge concern. The situation was inevitable, some schools had 2 SEN pupils while others had 20. The local authority were looking at the deficits and High Needs costs.

It was noted that 14 schools had set a deficit balance in 2023-24, with some schools over forecast their deficits for the 2024-25 and the new team member would be able to support schools with budget forecasting going forward.

It was further noted that the percentage for the upcoming pay increments for staff was currently unknown but any pension contribution costs would be funded.

HMc stated that they had inherited a 2 form entry school with a deficit budget, pupil numbers were low at that time however now the school was full but it would take time for funding to filter through and address the deficit.

It was further noted that some pupils lived in poverty but also attended a school that was in poverty. Some schools were in deficit due to falling rolls and other were in deficit due to high needs costs.

DUB stated that schools would welcome the support but the funding model needed to change, there were 24 pupils with Education Health Care Plans (EHCP) at his school. Headteachers did not want to be in deficit. Schools were failing pupils due to a lack of funding.

It was stated that the number of EHCPs needed to be equalised across the Borough although pupils needed to be in the best provision to meet their needs. Support staff were all supporting pupils with an EHCP so were not available to support others with needs.

**Forum members noted the report**

## **6. SECTION 251 BUDGET SUBMISSION 2024-25**

**Forum members were asked to note the section 251 budget statements.**

At the end of the budget allocation for 2024-25 the Local Authority reported a deficit of £16.5m, which when added to the carry forward from the previous year resulted in a cumulative deficit of £32m.

Forum members questioned how they compared to other local authorities. In response it was noted that nearly all local authorities were in deficit and some were on the DfE's Safety Valve programme. There was a clear reason for the local authority to move quickly in order to support schools more. It was further questioned if there was interest charged on the deficit. In response it was noted that the local authority managed cash overall, the debt was to Havering but interest was charged if they borrowed from other sources. PWLB, the treasury, would charge interest which was variable on the loan made to the local authority. The local authority was not currently charging schools

interest on their deficits. The Dedicated Schools grant (DSG) would remain separate along with the High Needs block deficit balance.

Forum members noted that by August 2024 the local authority had to submit a recovery plan to the Government for the capitalisation loan, which was due to the local authority borrowing money as it was in deficit.

It was questioned if there was any research being undertaken as to why High Needs were increasing. TC advised that when they were invited to join DBV programme, the local authority knew they had high levels of inclusivity in schools, which surprised the DfE. The DBV workbook was being looked at alongside Early Help and building parent confidence in schools but ultimately there was not enough funding. The 2014 reforms were not funded. It was noted that there was an increase in the number of EHCPs in Reception classes. There was also an increase in complex medical needs and there was a gap in the provision for these. The increasing number of these cases needed to be looked at alongside the EHCP process taking a long time.

**Forum members noted the section 251 budget statements.**

## **7. EARLY YEARS FUNDING UPDATE**

**Forum members were asked to note the report.**

The report had been previously presented to Early Year providers on 19<sup>th</sup> April 2024.

JM questioned if there was anything to consider that would happen over the next 5 years generally. In response TC advised that there was an updated pupil plan for 2023-28 for projections, they were looking at expansion in some areas as needed, central Romford had the biggest demographic growth, they were also looking at wrap-around care.

It was further questioned if there would be any schools closed leading to redundancies. In response it was noted that any school could be looking at potential redundancies due to pupil numbers. They were also looking at fair access and putting a cap on numbers over PAN in schools. Currently spaces were available in schools but they were not where people were living.

**Forum members noted the report.**

## **8. HIGH NEEDS FUNDING RATES 2024-25 AND DELIVERING BETTER VALUE (DBV) UPDATE**

**Forum members were asked to note the report and agree for the resumption of the High Needs Task and Finish Group, and specialist sub-groups, to review current year and future year arrangements for High Needs funding levels and support.**

The DBV report had been circulated.

The High Needs Task and Finish Group had agreed the funding arrangements at their meeting held on 30<sup>th</sup> November 2023. This was noted at the Funding Forum meeting on 11st January 2024.

The Task and Finish Group would look again at the funding for 2025-26. It was noted that

there was not enough funding locally and nationally for high needs.

TC advised that some funding had been spent on a Thematic Review and this would be consulted on via Primary cluster groups, Early Years and Secondary School groups in order to obtain full feedback. All feedback would feed into a SEND strategy which would be presented to Cabinet in September 2024. Once approved it could be put into practice. The action plan would improve the offer.

Discussions with regards to High Needs would be formalised and the Task and Finish Group for High Needs would be set up. There would be a meeting scheduled before the summer holidays.

**ACTION: TC**

**Forum members noted the report.**

**Forum members agreed to the resumption of the High Needs Task and Finish Group, and specialist sub-groups, to review current year and future year arrangements for High Needs funding levels and support.**

## **9. NEXT MEETINGS**

Forum members noted the dates of the upcoming meetings for the next academic year.

Thursday 19th September 2024 (room 233)  
Thursday 17th October 2024 (room 235)  
Thursday 28th November 2024 (room 235)  
Thursday 16th January 2025 (room 233)  
Thursday 13th February 2025 (room 233)  
Thursday 12th June 2025 (room 235)

Meetings to start at 8.00 a.m. at CEME room 233 or 235.

## **10. ANY OTHER BUSINESS**

Forum members raised the issue of libraries being closed as this would impact pupils reading and increase their loneliness. It was requested that the email to Headteachers be re-circulated. Leaflets would be circulated and it was requested if an electronic version of the leaflet could also be circulated. It was noted that there was an extensive consultation taking place regarding the closure of libraries. It was being considered to close 5 libraries in the Borough.

**ACTION: TC**

Meeting closed at 9:15 am

# Agenda Item 7

Schools Funding Forum - 17th October 2024

Item 5 - Appendix A

## Early years budget grant (EYBG) 2024 to 2025

|   |             |
|---|-------------|
| Provisional Grant                                       | £138,784.21 |
| Jan-23 Data   | 5929.18     |
| hourly rate - yearly equivalent trf for EYBG            | £0.04       |
| hourly rate - pro-rata 7 months equivalent trf for EYBG | £0.07       |

|                                 |                    |
|---------------------------------|--------------------|
| Updated data - Jan-24           | 6100.37            |
| <b>Anticipated Grant Amount</b> | <b>£141,986.11</b> |

| Number of schools applicable - Teachers Pension Scheme |           | number of children |                 | hours |
|--|-----------|--------------------|-----------------|-------|
| Scheme   | count     | children           | hours           |       |
| Academy  | 5         | 138                | 43401           |       |
| Maintained   | 18        | 677                | 190899.5        |       |
| <b>Total</b>   | <b>23</b> | <b>815</b>         | <b>234300.5</b> |       |

| Provider Type | count      | hours            |
|---------------|------------|------------------|
| Maintained    | 41         | 12012            |
| Maintained    | 38         | 10440            |
| Maintained    | 54         | 17070            |
| Maintained    | 44         | 11265            |
| Maintained    | 46         | 11760            |
| Academy       | 36         | 11130            |
| Academy       | 23         | 8310             |
| Academy       | 26         | 7896             |
| Maintained    | 37         | 8445             |
| Maintained    | 35         | 8700             |
| Maintained    | 33         | 8756             |
| Maintained    | 44         | 13125            |
| Maintained    | 38         | 9180             |
| Academy       | 22         | 6615             |
| Maintained    | 48         | 12510            |
| Maintained    | 9          | 3060             |
| Maintained    | 31         | 9363             |
| Academy       | 31         | 9450             |
| Maintained    | 44         | 14052            |
| Maintained    | 33         | 11130            |
| Maintained    | 30         | 8601.52          |
| Maintained    | 36         | 9730             |
| Maintained    | 36         | 11700            |
| <b>Total</b>  | <b>815</b> | <b>234300.52</b> |

| Option 1            |
|---------------------|
| rate based on count |
| £174.22             |
| Amount - 1          |
| £7,143              |
| £6,620              |
| £9,408              |
| £7,666              |
| £8,014              |
| £6,272              |
| £4,007              |
| £4,530              |
| £6,446              |
| £6,098              |
| £5,749              |
| £7,666              |
| £6,620              |
| £3,833              |
| £8,362              |
| £1,568              |
| £5,401              |
| £5,401              |
| £7,666              |
| £5,749              |
| £5,226              |
| £6,272              |
| £6,272              |
| <b>£141,988</b>     |

| Option 2            |
|---------------------|
| rate based on hours |
| £0.61               |
| Amount - 2          |
| £7,279              |
| £6,327              |
| £10,344             |
| £6,827              |
| £7,127              |
| £6,745              |
| £5,036              |
| £4,785              |
| £5,118              |
| £5,272              |
| £5,306              |
| £7,954              |
| £5,563              |
| £4,009              |
| £7,581              |
| £1,854              |
| £5,674              |
| £5,727              |
| £8,516              |
| £6,745              |
| £5,213              |
| £5,896              |
| £7,090              |
| <b>£141,987</b>     |

| Difference |
|------------|
| £136       |
| -£293      |
| £936       |
| -£839      |
| -£887      |
| £473       |
| £1,029     |
| £255       |
| -£1,328    |
| -£826      |
| -£443      |
| £288       |
| -£1,057    |
| £176       |
| -£781      |
| £286       |
| £273       |
| £326       |
| £850       |
| £996       |
| -£13       |
| -£376      |
| £818       |
| <b>-£1</b> |



**Subject Heading:**

**Early Years Funding**

**Report Author:**

**Hany Moussa – Principal Education  
Finance Officer**

**Eligibility to vote:**

**All school and academy members and  
the representative of the PVI sector**

### SUMMARY

This report provides details of the adjustment in Early Years Block funding received from the DfE for 2023-24 and details of additional funding announced for the current and future financial years.

### RECOMMENDATIONS

That the Schools Funding Forum:

- (i) notes the details of the funding adjustment for 2023-24 and the funding arrangements for 2024-25
- (ii) agrees the funding methodology for distributing the new EYBG for applicable Early Years providers

### REPORT DETAIL

#### **1. 2023-24 financial year funding adjustment**

The Early Years Block of the Dedicated Schools Grant is calculated using data collected at the January census each year. An adjustment is made to the indicative funding received for the autumn and spring terms to reflect the hours recorded at the January census that fell within the financial year. This adjustment takes place after the

end of the financial year, usually in July. In the past Havering has seen funding both increased and decreased.

Initial funding for the whole of the 2023-24 financial year was calculated using January 2023 census data. In the final allocation, funding for the autumn and spring terms was recalculated using data from the January 2024 census.

### 2023-24 financial year

| Term        | Census data used      |                  |
|-------------|-----------------------|------------------|
|             | Indicative allocation | Final allocation |
| Summer 2023 | January 2023          | January 2023     |
| Autumn 2023 | January 2023          | January 2024     |
| Spring 2024 | January 2023          | January 2024     |

The final 2023-24 Early Years Block allocation, released in July 2024 and September 2024, shows an increase of £270,808.

| Element                            | Initial EY Block<br>2023-24<br>£ | Final EY Block<br>2023-24<br>£ | Adjustment<br>2023-24<br>£ |
|------------------------------------|----------------------------------|--------------------------------|----------------------------|
| 2 year old entitlement             | 1,877,303                        | 1,824,047                      | -53,256                    |
| Universal 3&4 year old entitlement | 13,355,968                       | 13,488,699                     | 132,731                    |
| Extended 3&4 year old entitlement  | 5,975,531                        | 6,168,384                      | 192,853                    |
| EY Pupil Premium                   | 117,255                          | 121,938                        | 4,683                      |
| Disability Access Fund             | 112,608                          | 112,608                        | 0                          |
| Early Years Supplementary Grant    | 739,270                          | 733,067                        | -6,203                     |
| <b>Total</b>                       | <b>22,177,935</b>                | <b>22,448,743</b>              | <b>270,808</b>             |

An estimate of the likely increase in funding, to pay for the additional claims, was calculated prior to the closure of the 2023-24 accounts and an increase of £270,782 included in the outturn figures reported to the Schools Forum at the meeting of 13<sup>th</sup> June 2024. The release of the final allocations for 2023-24 has no material effect on the reported Early Years outturn.

## 2. Funding for 2024-25 and future financial years

Funding rates for 2024-25, which includes the new expanded entitlement being extended to Under Twos (9 months old to two year olds) for working families is as follows:

| <b>Funding Factor</b>                               | <b>Funded age of the child</b>   | <b>2024-25 Funding Rate</b>  |
|---|--|--|
| <b>Factor 1</b><br><br>Base rate                    | <b>9 months to Two year olds (Under Twos)</b><br><br><i>Rates are effective from Autumn Term 2024</i>  | £11.05 per hour  |
|   | <b>Two year olds – working parents</b>   | £8.05 per hour   |
|   | <b>Two year olds – disadvantaged families</b><br><br>(includes an in-built deprivation rate)   | £8.59 per hour   |
|   | <b>Three and four year olds</b><br>Universal 15 hours funding<br><br>Extended 30 hours funding   | £5.56 per hour   |
| <b>Factor 2</b><br>Deprivation Funding rate         | <b>Three and four year olds</b>  | IDACI A - £0.78 per hour<br>IDACI B - £0.59 per hour<br>IDACI C - £0.55 per hour<br>IDACI D - £0.51 per hour<br>IDACI E - £0.33 per hour<br>IDACI F - £0.27 per hour |
| <b>Factor 3</b><br>Early Years Pupil Premium (EYPP) | - <b>9 months to Two year olds (Under Twos)</b><br>- <b>Two year olds – working parents</b><br>- <b>Two year olds – disadvantaged families</b><br>- <b>Three and four year olds</b>                  | £0.68 per hour   |
| <b>Factor 4</b><br>Disability Access Funding (DAF)  | - <b>9 months to Two year olds (Under Twos)</b><br>- <b>Two year olds – working parents</b><br>- <b>Two year olds – disadvantaged families</b><br>- <b>Three and four year olds</b>                  | £910 per annum   |
| <b>Factor 5</b><br><br>Inclusion Fund               | <b>SENIF:</b><br>- <b>9 months to Two year olds (Under Twos)</b><br>- <b>Two year olds – working parents</b><br>- <b>Two year olds – disadvantaged families</b><br>- <b>Three and four year olds</b> | Summer term - £5.56 per hour<br>Autumn Term - £644 per setting<br>Spring Term - £506 per setting   |
|   | - <b>9 months to Two year olds (Under Twos) Complex Needs/EHCP</b>   | SENIF - £5.56 per hour*<br>Complex Needs - £0.39 per hour*   |
|   | - <b>Two year olds – working parents Complex Needs/EHCP</b>  | SENIF - £5.56 per hour*<br>Complex Needs - £3.39 per hour*   |
|   | - <b>Two year olds – disadvantaged families Complex Needs/EHCP</b>   | SENIF - £5.56 per hour*<br>Complex Needs - £2.85 per hour*   |
|   | - <b>Three and Four year olds Complex Needs/EHCP</b>   | SENIF - £5.56 per hour*<br>Complex Needs - £5.88 per hour*   |

\* This is the sum required to bring the total hourly funding for a child to £17.00. This is the hourly rate paid in support of an EHCP for a pupil in Years R -11.

The SENIF arrangements for funding low intervention has been reviewed and streamlined, and effective from the Autumn term, providers have to follow a streamlined application process which provides funding to put in place support for

those children at the provisions, with £644 per setting for the Autumn term and £506 per setting for the Spring Term. The equivalent amount for the Summer term is £598 per setting. Due to the increased applications for the Complex Needs/EHCP element of the SENIF fund, this streamlined process will ensure that the Panel can consider the applications for that cohort more effectively and ensure targeted support can be put in place at the provision.

### 3. The expansion of funded childcare

As well as increased funding for 2 and 3&4 year olds, the spring 2023 budget contained an announcement on the expansion of funding childcare and set out the following timetable:

|                |   |
|----------------|---|
| Autumn 2023    | <ul style="list-style-type: none"> <li>• Childminder grants become available</li> <li>• Staff : child ratio change from 1:4 to 1:5</li> </ul>                       |
| April 2024     | <ul style="list-style-type: none"> <li>• 15 funded hours for working parents of 2 year olds introduced</li> </ul>   |
| September 2024 | <ul style="list-style-type: none"> <li>• National wraparound support begins</li> <li>• 15 hours for working parents of children 9 months plus introduced</li> </ul> |
| September 2025 | <ul style="list-style-type: none"> <li>• 30 hours for all working parents of children from 9 months to primary school age introduced</li> </ul>                     |
| September 2026 | <ul style="list-style-type: none"> <li>• All schools to offer 8am – 6pm wraparound care on their own or in partnership</li> </ul>                                   |

### 4. 2024-25 Early Years Budget Grant (EYBG)

#### 4.1 Overview

The DfE is providing £34 million in additional funding for local authorities in 2024-2025 to support affected early years providers in managing the costs associated with the recent teacher pay award. This funding, part of a broader £1.2 billion package for the 2024 teachers' pay award, will be distributed via the EYBG for the period 1 September 2024 to 31 March 2025. The methodology for allocating EYBG funding follows the same principles as those applied to the incorporation of the historic Teachers' Pay Grant (TPG).

#### 4.2 Methodology & Funding Rates

EYBG funding has been apportioned between the 3 and 4 year old Early Years National Funding Formula (EYNFF) entitlement and Maintained Nursery Schools (MNS) supplementary funding. The calculation uses core and MNS hourly rates derived from local authorities' part-time equivalent (PTE) counts. The rates are based on the same data sources used to calculate the early years block of the Dedicated Schools Grant (DSG), with an additional baseline established for EYBG rates.



The core EYBG rate for each local authority is calculated based on a notional baseline, using the proportion of the historic TPG they received, that helped with the increased pay costs for teachers.

The indicative allocation, based on the January 2023 census is £138,784, however the final allocation will be based on the January 2024 Census, and the expected grant allocation is projected to increase to be £141,986. The funding proposals referred to in later sections reflect the projected grant allocation.

### **4.3 Payments**

EYBG allocations will be paid in a single payment on 29 November 2024 to cover the period from 1 September 2024 to 31 March 2025. Local authorities must ensure timely and accurate distribution of the funding to their early years providers, with certification required in spring 2025 to confirm the correct allocation.

### **4.4 Allocations & Conditions**

Allocations are based on PTE data from the January 2024 early years census and will not be subject to further adjustment. Local authorities are given flexibility in how they allocate funding locally, although they must adhere to the EYBG conditions of grant. Although the DfE grant calculation and advice is targeted to mainstream schools with nurseries which are affected by the additional costs of the pay award. Schools Forum consultation is not required but is encouraged to ensure stakeholder involvement where possible.

We are proposing that School Forum reviews and agrees which of the two options at distributing the grant to mainstream schools with nurseries. The options proposed for the three and four year old with a lump sum per head count, or alternatively an hourly rate per claim as at the Autumn 2024 term census, demonstrated in Appendix A.

Local authorities must ensure that EYBG funding is fully passed on to applicable early years providers and not used for contingency or administrative costs. Providers must receive clear communication regarding their allocations. The DfE expects transparency in the distribution process to allow providers to understand the basis of their funding.

NFF projected rates 2025-26

Area Cost Adjustment 2024-25 1.08352

Factor

Primary

Secondary

|  |
|--|
| Basic per pupil                        |
| <i>excl other grants (below)</i>       |
| Free School Meals                      |
| FSM Ever 6                             |
| <i>excl MSAG</i>                       |
| IDACI A                                |
| IDACI B                                |
| IDACI C                                |
| IDACI D                                |
| IDACI E                                |
| IDACI F                                |
| Low Prior Attainment                   |
| EAL                                    |
| Mobility                               |
| Lump sum                               |
| <i>excl MSAG</i>                       |
| Minimum per pupil funding level (MPPL) |
| <i>excl MSAG</i>                       |
| Minimum Funding Guarantee              |
| Gains cap                              |

| 2024-25     |            | 2025-26 projected |            | % change |
|-------------|------------|-------------------|------------|----------|
| NFF £       | LBH £      | NFF £             | LBH £      | LBH      |
| 3,562.00    | 3,859.50   | 3,775.00          | 4,090.29   | 5.98     |
| 3,443.00    | 3,730.56   | 3,562.00          | 3,859.50   | 3.46     |
| 490.00      | 530.92     | 490.00            | 530.92     | 0.00     |
| 820.00      | 888.49     | 1,008.00          | 1,092.19   | 22.93    |
| 716.00      | 775.80     | 820.00            | 765.30     | 1.37     |
| 680.00      | 736.79     | 680.00            | 736.79     | 0.00     |
| 515.00      | 558.01     | 515.00            | 558.01     | 0.00     |
| 485.00      | 525.51     | 485.00            | 525.51     | 0.00     |
| 445.00      | 482.17     | 445.00            | 482.17     | 0.00     |
| 285.00      | 308.80     | 285.00            | 308.80     | 0.00     |
| 235.00      | 254.63     | 235.00            | 254.63     | 0.00     |
| 1,170.00    | 1,267.72   | 1,170.00          | 1,267.72   | 0.00     |
| 590.00      | 639.28     | 590.00            | 639.28     | 0.00     |
| 960.00      | 1,040.18   | 960.00            | 1,040.18   | 0.00     |
| 134,400.00  | 145,625.09 | 142,406.00        | 154,299.75 | 5.96     |
| 129,890.00  | 140,738.41 | 134,400.00        | 145,625.09 | 3.47     |
| 4,610.00    | 4,610.00   | 4,823.00          | 4,823.00   | 4.62     |
| 4,467.00    | 4,467.00   | 4,610.00          | 4,610.00   | 3.20     |
| 0.0% - 0.5% | 0.5%       | 0.0% - 0.5%       | 0.5%       |          |
| n/a         | 2.5%       | tba               | t.b.c.     |          |

| 2024-25 |             | 2025-26 projected |             | % change   |       |
|---------|-------------|-------------------|-------------|------------|-------|
| NFF £   | LBH £       | NFF £             | LBH £       | LBH        |       |
| KS3     | 5,022.00    | 5,441.44          | 5,322.00    | 5,766.50   | 5.97  |
| KS4     | 5,661.00    | 6,133.81          | 6,000.00    | 6,501.12   | 5.99  |
| KS3     | 4,854.00    | 5,259.41          | 5,022.00    | 5,441.44   | 3.46  |
| KS4     | 5,471.00    | 5,927.94          | 5,661.00    | 6,133.81   | 3.47  |
|         | 490.00      | 530.92            | 490.00      | 530.92     | 0.00  |
|         | 1,200.00    | 1,300.22          | 1,477.00    | 1,600.36   | 23.08 |
|         | 1,047.99    | 1,135.52          | 1,200.00    | 1,300.22   | 14.50 |
|         | 945.00      | 1,023.93          | 945.00      | 1,023.93   | 0.00  |
|         | 740.00      | 801.80            | 740.00      | 801.80     | 0.00  |
|         | 690.00      | 747.63            | 690.00      | 747.63     | 0.00  |
|         | 630.00      | 682.62            | 630.00      | 682.62     | 0.00  |
|         | 450.00      | 487.58            | 450.00      | 487.58     | 0.00  |
|         | 340.00      | 368.40            | 340.00      | 368.40     | 0.00  |
|         | 1,775.00    | 1,923.25          | 1,775.00    | 1,923.25   | 0.00  |
|         | 1,585.00    | 1,717.38          | 1,585.00    | 1,717.38   | 0.00  |
|         | 1,380.00    | 1,495.26          | 1,380.00    | 1,495.26   | 0.00  |
|         | 134,400.00  | 145,625.09        | 142,406.00  | 154,299.75 | 5.96  |
|         | 129,890.00  | 140,738.41        | 134,400.00  | 145,625.09 | 3.47  |
|         | 5,532.89    | 5,995.00          | 6,314.50    | 6,314.50   | 5.33  |
|         | 5,353.11    | 5,800.20          | 5,995.00    | 5,995.00   | 3.36  |
|         | 0.0% - 0.5% | 0.5%              | 0.0% - 0.5% | 0.5%       |       |
|         | n/a         | 2.5%              | tba         | t.b.c.     |       |

Sums consolidated into NFF funding rates

|                           | 2024-25   |
|---------------------------|-----------|
|                           | MSAG      |
| Basic per pupil - Primary | £119.00   |
| Basic per pupil - KS3     | £168.00   |
| Basic per pupil - KS4     | £190.00   |
| Primary FSM6              | £104.00   |
| Secondary FSM6            | £152.00   |
| Lump sum                  | £4,510.00 |

| 2025-26   |           |           |
|-----------|-----------|-----------|
| TPAG      | TPECG     | CSBG      |
| £62.00    | £75.00    | £76.00    |
| £86.00    | £106.00   | £108.00   |
| £98.00    | £119.00   | £122.00   |
| £53.00    | £65.00    | £70.00    |
| £77.00    | £100.00   | £100.00   |
| £2,306.00 | £2,800.00 | £2,900.00 |

## **Forum De-delegation: English as an Additional Language service**

To retain a central EAL Team to maintain the high levels of support and response to Havering's maintained primary schools, the LA is proposing that the sum per EAL pupil de-delegated remains unchanged. It is proposed that £38 per EAL pupil be de-delegated in the financial year 2025-26. This would provide funding of £114,538 towards the costs of the team which would otherwise be put at risk should an insufficient number of schools decide not to buy into the service.

The percentage of EAL learners in Havering primary schools is continuing to increase at an accelerated rate. In January 2024, the Havering primary school population stood at 30.4% EAL compared to 22.8% nationally, representing a rate of increase from January 2023 that is nearly double the national average (1.5% compared to 0.8% nationally).

Through the national funding formula, primary schools receive £639.28 per EAL3 pupil so would retain 94% of their funding to provide support to their EAL pupils.

### **Rationale for maintaining a central team with EAL expertise in Havering**

#### **1. Demographics are changing rapidly**

Havering's demographic is continuing to change rapidly with migration to the borough directly from a wide range of countries and from across the UK.

From 1st June to 1st September 2024, 105 Havering primary school applications were received from children transferring from abroad, of whom 41 were recorded as having no English. Children continue to arrive from areas of conflict, some of whom have benefitted from the Homes for Ukraine in-school teaching project, managed by the EAL team.

#### **2. The service is well-used by schools**

From April 2023 to March 2024:

- 33 LA-maintained primaries accessed the service for consultancy support and/or CPD. This figure does not include the additional ongoing support that was given to schools in response to telephone queries and emails.
- Delegates from 26 LA-maintained primary schools attended EAL networks and/or CPD with over 100 course bookings.
- The HES EAL resources pages are well used by Havering schools with key documents that can only be accessed via log in. Over the past year, staff from at least 22 LA-maintained primaries have accessed the resources, many on a regular basis.
- The centrally-funded Homes for Ukraine in-school teaching project for 2023-2025 is managed by the EAL team. Without de-delegated EAL funding, this precise targeting of need could not exist. This has benefited pupils in 24 different schools across the primary and secondary phase.
- With regard to academy buy-back, 22 academies (an increase from previous buyback from 20 academies) accessed the service. There were 43 bookings for EAL networks and/or courses from academy subscribers. The resources

area was used well with nearly 200 views by staff logged in from subscribing academies.

### **3. Fluctuating school needs could put the service at risk**

Unlike other service areas which generate a more consistent level of need, EAL needs fluctuate across schools due to changing populations and the experience and expertise of individual staff. School demographics can change rapidly which, in addition to changes in staffing, can lead to needs arising where there may have been none previously. This makes it more difficult for the EAL team to project a guaranteed income to fund salaries. Without collective buy-in from schools, EAL support could cease to exist within Havering and schools would have to source support from elsewhere. The sum de-delegated from a school is an average of £2,937, which means the majority of schools would benefit financially from de-delegation compared to the cost of buying a similar level of service externally.

### **4. A discrete EAL service allows flexibility**

The benefit of maintaining the current model, as opposed to incorporating EAL into the Hsis packages, is the flexibility of the support. Schools can request visits as and when required without having to allocate package time; they can request a number of short visits or online calls throughout the year which can be arranged in response to the admission of new children as opposed to full consultancy days which need to be timetabled in advance. These flexible visits can cover a wide range of areas from pupil-focused observations to in-house EAL CPD and/or teacher surgeries. In addition, the model for EAL networks, as explained above, allows for networking between teaching assistants as well as teachers, helping maximise the real expertise that exists amongst our EAL TAs.

### **EAL team capacity**

The EAL Advisers are available to provide termly EAL visits to schools as requested by individual EAL Co-ordinators/SLT. Schools are reminded by email at least three times a year of upcoming courses and the availability of support.

The capacity of the team continues to be enhanced by a specialist secondary EAL consultant who is increasingly working with secondary subscribers. If needs dictate, her role could be increased to work with a greater number of schools including primary schools.

Across the three Advisers, all requests for support have been met and, to date, there has been no instance of a request not being met.

### **The offer for LA-maintained primaries:**

- Termly consultancy visits on request (more available as required, depending on the needs of individual schools – may be virtual or face-to-face)
- Consultancy visits may consist of: development of the role of the EAL co-ordinator; pupil-focused advice/observations; in-house EAL CPD; teacher surgeries/trouble-shooting; EAL reviews
- Twice-termly networks for EAL co-ordinators and EAL TAs (one virtual and one face-to-face per term)
- Unlimited access to centrally-held EAL CPD (may be virtual or face-to-face)

- Telephone and email support
- Access to the subscriber-only content on the HES EAL resources pages:  
<https://www.hes.org.uk/Page/147>

**Impact of the EAL team:**

The targeted work of the EAL team with EAL co-ordinators, class teachers and TAs helps schools tailor their provision to ensure EAL learners make rapid progress. As a result, pupils that start with limited English across all phases make accelerated progress in order to reach age-related expectations or close the gap towards this.

Havering is attracting considerable migration from other London boroughs, including families with limited proficiency in English, in addition to increasing numbers of displaced families arriving from areas of conflict with very little English. Central EAL funding will ensure that schools receive EAL support in order to meet the needs of these vulnerable children as and when required, including the management of the central Homes for Ukraine budget which has allowed for precise targeting of need via specially-commissioned in-class teaching support.

### **Social Emotional and Mental Health Team (SEMH Team)**

The LA is seeking de-delegation for SEMH services which now form part of SEND Education Support Service (formerly CAD 5 to 19).

De-delegated funding will be used to provide an enhanced resource of School Support Family Practitioners (SSFPs), meaning that this will be provided to maintained schools without an additional charge.

The primary purpose of this service is to work closely with families of vulnerable children with SEMH needs, to prevent permanent exclusion and suspension, maintain placement and positive working relationships between home and school. The service will also provide early intervention work with children and parents. SSFPs work in a similar way to family practitioners within Early Help, but with a strong focus on educational outcomes alongside family support.

### **Rationale for maintaining a central SSFP service in Havering**

The allocation of practitioner time is determined by reference to the schools' Vulnerability Table, which is produced by statistical analysis of the volume of SEN, LAC, mobility and EAL in each school.

SSFPs provide tailored support and interventions based on the identified needs of the family. In partnership with families and other agencies, specifically Education provisions, they carry out a comprehensive assessment, address identified needs and ensure sustainable long-term change is achieved.

They also have a thorough understanding of local need and available resources enabling them to engage partner agencies effectively to ensure that families achieve optimum outcomes.

### **The offer for LA-maintained primaries:**

The service has been re-structured to include 1 x Senior SSFP and 3 x SSFPs, providing sufficient capacity to support c200 families per 12-month period. The job profiles for these posts are shown below.

Referrals will be allocated based on a minimum of at least 1 individual case per year per school (core offer = approx 60 families) and remaining referrals will be allocated (approx. 60) according to the vulnerability data and needs of the situation – with priority given to the more vulnerable schools. The most vulnerable schools will also have the opportunity to access small group interventions for children who would benefit from early intervention for their SEMH needs, delivered by the Senior SSFP and an SEMH Advisor.

All schools, regardless of their vulnerability data, will also have access to parenting groups also delivered by the Senior SSFP and an SEMH Advisor.

This will allow for a further 100 families to be supported, representing an overall 90% increase on the current offer.

Schools complete a SEND Gateway Referral Form (SGRF) selecting the SSFP box and submit to [cad5to19@havering.gov.uk](mailto:cad5to19@havering.gov.uk) and these are triaged fortnightly on a Friday.

The SSFP role supports the family in working alongside the child's current education setting where challenging behaviour is a concern, giving the opportunity to work on shared goals with the aim of improving educational outcomes for Havering children and the quality of life and experiences for Havering families.

This early intervention provision is for children and young people aged between five and eleven years' old who have identified SEMH needs, and are not currently known to Early Help or Social Care.

SSFPs provide tailored support and interventions based on the identified needs of the family. For those families accessing individual intense support from the service, the SSFP will contact the family and within five days of case allocation, and undertake an initial home visit. The SSFP will complete an assessment with the family and gain input from the child's school. This will highlight any other areas of support needed and the wishes and feelings of the child / children will be gained. From the identified needs, an action plan will be devised for the family.

Once the assessment has been completed, TAF (Team Around the family) meetings will be facilitated at regular intervals, which will be dependent on the needs of the family and the level of support implemented. On average, this meeting will be scheduled every 4-6 weeks and provides an opportunity where the parent/s and a team of multi-agency professionals working with the family will review and update the SMART action plan. The average time an SSFP supports an individual child, family and school is four months, with the option to extend in exceptional circumstances.

The SSFP will work directly with the parents and child offering support and interventions which will be tailored to the individual family needs. Various evidence based parenting programmes are currently being run by qualified facilitators which parents can access through a referral with the main focus being around managing SEMH needs in the home, as well as maintaining their mainstream school place and enjoying a positive school experience.

The Children and Parent groups are managed and organised by the Senior SSFP, in liaison with each school on an individual basis. Parent support groups are delivered in Clusters on a half-termly basis, one cluster per half term.

## Impact of the SSFPs:

The SSFPs receive very positive feedback from the schools that they support, and have successfully engaged children and families to ensure that behaviour improves, and the risk of suspension and/or permanent exclusion reduces.

102 families were supported in 2021 across 2 full time and 1 supervisory SSFP positions - 98% of these children are still within their original placements, 2% are now receiving their education outside of Havering in out-of-borough placements. It is not possible at this time to provide more up-to-date data, as the new way of working began this financial year (2024-25), with the parent and children groups starting this academic year (September 2024). Anecdotal feedback from schools and parents involved so far has been very positive with excellent uptake from parents and engagement from children. We anticipate expanding the number of parent groups after Christmas (January 2025) to support more families, due to the feedback received so far.

Below are a couple of direct quotes from parents.

*Parent A - "Carla was amazing and always there when we need her, without her we wouldn't get to where we are now. Thanks a lot for her help and support."*

Parent A is the parent of a young person with social communication needs, the SSFP was able to help the parents with seeking support from the appropriate health care professionals and organise next steps. The young man in question was previously receiving regular fixed term exclusions, SSFP was able to support the school in communicating with the parents and linking behaviour strategies to the home environment.

*Parent B - "Carla was amazing from the start, I didn't really know about Early Help I thought it was for bad parents. But Carla explained everything they do, Carla was very helpful and really listened to me, she went above and beyond what I expected. Carla really helped me with my relationship with the school and got the necessary outside agencies involved. And she always found out answers for me if she didn't at the time.*

*Carla really listened to XXXX as well, and at times XXXX enjoyed talking to Carla even asking when he will she be coming to his school. I feel without Carla, my situation with XXXXX and the school would never have improved. We have all come a long way since the beginning and it wouldn't have been able to do it without her."*

Parent B is the mother of a child with complex needs who had experienced multiple suspensions and was on the brink of permanent exclusion, following SSFP support his mother has built a positive relationship with the school/developed an understanding of her son's behaviour and how to manage it. Her son is no longer at risk of permanent exclusion.



## Job profile for the post of Senior School Family Practitioner

(Competency profile and items common to all job profiles have been omitted)

### London Borough of Havering

#### Job Profile

|   |   |
|---|---|
| <b>Job Title:</b><br>Senior School Support Family Practitioner (SSFP)                 | <b>Directorate:</b><br>Children's Services - Education                                      |
| <b>Service/Section:</b><br>Special Education Needs and/or Disabilities (SEND) Service | <b>Post Number(s):</b><br>NEW<br><b>Job Evaluation Number:</b><br>3203                      |
| <b>Grade:</b><br>Grade  | <b>Date last updated</b><br>October 2022<br><b>Date of last Evaluation:</b><br>October 2022 |

#### Main Purpose of the Job/Key Objectives:

The primary purpose of this post is to supervise the work of and line manage three SSFPs key working a caseload of families and individuals within the CAD Social, Emotional and Mental Health (SEMH) Team, as well as hold a caseload themselves. They will be working with education provisions and as part of a multi-disciplinary team in delivering interventions that aim to tackle issues identified. The team will be testing out new ways of intensive work with families to ensure positive and sustainable changes are made and that appropriate interventions are offered at the right time.

The key objectives are to undertake all of the following as well as oversee the work of three SSFPs who:

- Provide tailored support and interventions based on the identified needs of the family. This could also include intensive work with those in care, on the cusp of care or stepping down from statutory services.
- In partnership with families and other agencies-specifically education provisions, carry out a comprehensive assessment address identified needs and ensure sustainable long term change is achieved.
- Have a good understanding on local need, available resources and to effectively engage partner agencies to ensure families achieve optimum outcomes.
- Keep abreast with any changes to policies that may affect families, for example welfare reform, Troubled Families agenda etc

The Senior SSFP will oversee all aspects of the line management of their direct reports, work with the SEMH Team Manager to coordinate their programmes and ensure the quality and consistency of their work.

### **Job Context:**

1. The post holder reports to the SEMH Team Manager.
2. The post holder has supervisory responsibility for approximately three SSFPs but without full line management responsibility in terms of payroll and HR.
3. The post holder may be required to work weekends and evenings as required.
4. The post holder has no Financial/Resources responsibility but will support the SEMH Team Manager in accounting for spend on the SSFP and Senior SSFP.

### **Experience**

- Extensive experience of working with parents.
- Experience of working across organisational boundaries.
- Experience of working with children and Families including complex assessments and statutory work.
- Experience of working in a multi-disciplinary interagency basis and ability to negotiate on behalf of customers
- Experience of working in ways which empower and encourage participation of families.
- Experience of working with children with emotional and behavioural difficulties.
- Experience of managing adults or evidence of the qualities and experience to do so effectively.
- At least 2 years experience working in an educational environment

### **Qualifications**

- Level 2 Maths and English

## Key Accountabilities and Result Areas:

| Key Result Area   | Expected End Result   |
|---|---|
| Manage a caseload with an emphasis on encouraging participation, effective and meaningful involvement from families with an aim to improving outcomes for families      | Cases effectively managed with agreed outcomes for families achieved.   |
| Plans, delivers and reviews individual and family Support Plans to assist families with proposed actions set to ensure desired changes are achieved                     | Plans continually reviewed and updated, needs of families are met.  |
| Coordinate planning of services, taking account of the needs of families and issues they face when caring for their child/ren.  | All relevant professionals engaged at appropriate stages for each family.   |
| Identify families who meet the troubled family criteria and inform the appropriate TF lead to ensure payment by results are applied for                                 | All appropriate cases will be recorded on the TF database. PBR claims will evidence successful outcomes achieved by the direct work completed by the Tier 3 team. |
| Keeps up-to-date with good practice, current legislation and Directorate policy, practice and initiatives, and plays a lead role in disseminating these within the team | Accurately interprets legislation policies and procedures. Knowledge is up to date and shared with the team.  |
| Provides direct support to individuals as well as groups in order to raise awareness of difficulties faced by families.   | Direct support and intervention provided.   |
| Provides comprehensive family assessments and analysis based on information gathered to agreed timescales.  | All necessary information is gathered and included in assessments and made accessible to all appropriate agencies.  |
| Puts in place suitable intervention, prevention and enforcement measures that seek to reduce negative behaviour effecting the   | Intervention and prevention measures in place, all relevant parties feel supported engaged and included.  |

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| ability to achieve positive family change.   |   |
| To empower families to develop new skills and experience that will equip them to become independent. For example, training/employment opportunities.   | Families will be more independent and no longer require intensive intervention, leading to improved family outcomes.  |
| To share individual specialism with team members and offer appropriate support and advice to all staff within the CAD service and education provisions | Experience and knowledge is actively shared with the team and the benefits of multi-agency team are maximised within the CAD service and education provisions. Staff will feel supported and good professional relationships will be developed. |
| Maintains and encourages high professional standards within the team and directorate.  | Professional standards are maintained.  |
| Assists in the development of robust record keeping systems to disseminate information within the service.   | Records are kept up to date and accurate on all recording systems.  |
| Share with other service providers, the experiences of families and to contribute to developing means of improving this experience.                    | Knowledge and experience of direct work with families is shared with service providers as necessary.  |
| Negotiate and coordinate support for families through the development of effective outreach services, including one-to-one support and group work.     | Outreach services and support are in place for families and groups as agreed.   |
| Develop and maintain good working relationships with statutory, voluntary agencies.  | Relationships with all partner agencies are positive.   |
| Keeps professional knowledge and skills up to date.  | Relevant training workshops and courses attended  |
| To represent and speak on behalf of the CAD Service and education provisions at various multi-agency meetings.   | Is an excellent advocate of the service.  |

## Job profile for the post of School Family Practitioner

(Competency profile and items common to all job profiles have been omitted)

### London Borough of Havering Job Profile

|   |   |
|---|---|
| <b>Job Title:</b><br>School Support Family Practitioner (SSFP)                        | <b>Directorate:</b><br>Children's Services - Education  |
| <b>Service/Section:</b><br>Special Education Needs and/or Disabilities (SEND) Service | <b>Post Number(s):</b><br>10003222<br>10007778<br>NEW<br>NEW<br><b>Job Evaluation Number:</b><br>3447 |
| <b>Grade:</b><br>Grade  | <b>Date last updated:</b><br>July 2023<br><br><b>Date of last Evaluation:</b><br>July 2023            |

#### Main Purpose of the Job/Key Objectives:

The primary purpose of this post is to key work a caseload of families and individuals within the SEND SEMH Team and education provisions and to work as part of multi-disciplinary team in delivering interventions that aim to tackle issues identified. The team will be testing out new ways of intensive work with families to ensure positive and sustainable changes are made and that appropriate interventions are offered at the right time.

The key objectives are to:

- To undertake a key role in the Special Education Needs and/or Disabilities (SEND) Service. The SEND Team is responsible for providing direct support to children, young people, adults and their families and carers. They will also work very closely with early years settings, schools, colleges and other settings.
- Facilitate planning meetings (TAF meetings) and implement support plans for pupils presenting with social and emotional difficulties in mainstream schools and, at times, in specialist settings and alternative provision and their families.
- Provide direct support within schools, family homes and community buildings for children at risk of exclusion and/or demonstrating social and emotional difficulties who are vulnerable to poor outcomes.
- Regular meetings with parents, siblings and involved professionals to undertake interventions, update on progress and share concerns. Attend meetings as

required by other agencies including schools, social care and other CAD professionals.

- To manage own time and any other resources associated with these duties with due regard for efficiency, economy and effectiveness.
- Attend meetings outside core hours as and when necessary to meet the needs of the families.
- Supporting the needs of the family with wider contextual issues such as housing, benefits, health, parental mental health, EHCP applications, domestic abuse, MARAC attendance, CAMHS / paediatric appointments and paperwork. Making appropriate referrals to other agencies for specialist input and support.
- Assessing risk before, during and after home visits and taking appropriate action.
- Managing difficult relationships between parents and professionals to ensure the child has a successful school experience.
- Provide tailored support and interventions based on the identified needs of the family. This could also include intensive work with those in care, on the cusp of care or stepping down from statutory services.
- In partnership with families and other agencies-specifically Education provisions, carry out a comprehensive assessment address identified needs and ensure sustainable long term change is achieved.
- Have a good understanding on local need, available resources and to effectively engage partner agencies to ensure families achieve optimum outcomes.
- Keep abreast with any changes to policies that may effect families, for example welfare reform, Troubled Families agenda etc

### **Job Context:**

5. The post holder reports to the Senior SSFP.
6. The post holder has no line management responsibility.
7. The post holder may be required to work weekends and evenings as required.
8. The post holder has no Financial/Resources responsibility.

### **Experience**

- Extensive experience of working with parents.
- Experience of working across organisational boundaries.
- Experience of working with children and Families including complex assessments and statutory work.

- Experience of working in a multi-disciplinary interagency basis and ability to negotiate on behalf of customers
- Experience of working in ways which empower and encourage participation of families.
- Experience of working with children with SEMH needs.

### Qualifications

- Diploma level of education or equivalent.

### Key Accountabilities and Result Areas:

| Key Result Area  | Expected End Result   |
|--|---|
| Manage a caseload with an emphasis on encouraging participation, effective and meaningful involvement from families with an aim to improving outcomes for families       | Cases effectively managed with agreed outcomes for families achieved.   |
| Plans, delivers and reviews individual and family Support Plans to assist families with proposed actions set to ensure desired changes are achieved                      | Plans continually reviewed and updated, needs of families are met.  |
| Coordinate planning of services, taking account of the needs of families and issues they face when caring for their child/ren.   | All relevant professionals engaged at appropriate stages for each family.   |
| Identify families who meet the troubled family criteria and inform the appropriate TF lead to ensure payment by results are applied for                                  | All appropriate cases will be recorded on the TF database. PBR claims will evidence successful outcomes achieved by the direct work completed by the Tier 3 team. |
| Keeps up-to-date with good practice, current legislation and Directorate policy, practice and initiatives, and plays a lead role in disseminating these within the team  | Accurately interprets legislation policies and procedures. Knowledge is up to date and shared with the team.  |
| Provides direct support to individuals as well as groups in order to raise awareness of difficulties faced by families.  | Direct support and intervention provided.   |
| Provides comprehensive family assessments and analysis based on information gathered to agreed timescales.   | All necessary information is gathered and included in assessments and made accessible to all appropriate agencies.  |
| Puts in place suitable intervention, prevention and enforcement measures that seek to reduce negative behaviour effecting the ability to achieve positive family change. | Intervention and prevention measures in place, all relevant parties feel supported engaged and included.  |

|  |   |
|--|---|
| To empower families to develop new skills and experience that will equip them to become independent. For example, training/employment opportunities.   | Families will be more independent and no longer require intensive intervention, leading to improved family outcomes.  |
| To share individual specialism with team members and offer appropriate support and advice to all staff within the CAD service and education provisions | Experience and knowledge is actively shared with the team and the benefits of multi-agency team are maximised within the CAD service and education provisions. Staff will feel supported and good professional relationships will be developed. |
| Maintains and encourages high professional standards within the team and directorate.  | Professional standards are maintained.  |
| Assists in the development of robust record keeping systems to disseminate information within the service.   | Records are kept up to date and accurate on all recording systems.  |
| Share with other service providers, the experiences of families and to contribute to developing means of improving this experience.                    | Knowledge and experience of direct work with families is shared with service providers as necessary.  |
| Negotiate and coordinate support for families through the development of effective outreach services, including one-to-one support and group work.     | Outreach services and support are in place for families and groups as agreed.   |
| Develop and maintain good working relationships with statutory, voluntary agencies.  | Relationships with all partner agencies are positive.   |
| Keeps professional knowledge and skills up to date.  | Relevant training workshops and courses attended  |
| To represent and speak on behalf of the CAD Service and education provisions at various multi-agency meetings.   | Is an excellent advocate of the service.  |



## Trade Union facility time

### Introduction

There is a legal obligation on schools as employers to ensure they have in place arrangements to negotiate and consult with accredited Trade Union representatives and to afford their employees Trade Union representation, in compliance with legislation. Such arrangements include paid time off ('facilities time') for accredited trade union representatives to undertake these duties.

This service provides confidence to participating schools that they are fulfilling their legal obligations and ensuring their staff have access to employee representation from local Union representatives from across the County.

The support from Union representatives, available through de-delegation, also ensures that sensitive issues do not spiral out of control into situations involving formal procedures which can be extremely costly in both senior leadership time and money.

The scheme helps avoid the risk of operational disruption and the cost of schools having to release their own staff for specific training to fulfil this role and other functions linked to Trade Union facilities time.

By not having access to this local experienced resource there is an increased risk of lengthy and stressful processes that could impact on the running of schools and the health of all staff involved.

There are also increased risks around the following:

- Schools not fulfilling their legal duty.
- Schools not having access to a local Union rep resulting in delays in case management and resolution.
- Application of HR Policies impacted due to lack of availability of Union support.
- Lack of local mediation/discussion with regional reps who know the area.
- Escalation of grievances and cases (including sickness absence management) which might otherwise be avoided.
- Schools having to provide training for staff to the standard of local branch secretaries in order to fulfil legal duties.
- Schools unable to find staff who want to take on the Trade Union representative role.

### Trade union facility time and membership fees

There is also often confusion around individual member subscriptions to Unions and the facilities payments received from schools. There is a specific distinction between the two and what they cover:

- 1) **Individual membership fees** not only pay towards the overall running costs of unions, but members also receive a number of fringe benefits, from support and guidance, legal services, training, financial assistance, compensation, non-employment law and insurance.
- 2) **De-delegated Trade Union Facilities Time** from schools funds the release of local representatives within Havering. Unions work collaboratively with schools and the LA to enable a smooth and seamless service.

### Service provision

School leaders and governors are likely to only see a glimpse of the activity and support provided by Unions and what actually takes place in terms of casework.

A great deal of time is spent by local reps dealing with employees' concerns and grievances 'behind the scenes' in a way which prevents things ever escalating into confrontation and formal procedures.

Local Union reps help members work through conflict and change to the benefit of the members themselves and of school leaders.

The pooled arrangements allow facility time for branch secretaries to provide support to their members in a range of areas including:

### ***General Advice and Support***

1. Access for members to advice and support on employment issues from local representatives who understand Havering school issues because they work within them.
2. Prompt response to all requests for contact or support from Trade Union/professional association representatives.
3. Joint working between Trade Union representatives, LA Officers, members and school leaders, supporting staff whilst working collaboratively with management for best outcomes - to reduce escalation; maintaining open channels of communication to create resolution in challenging and difficult circumstances.
4. Schools and their staff are kept abreast of issues on the national Trade Union agenda and pertaining to collective agreements. All Unions work at a national level, campaigning and lobbying the government to reform key issues within education to support children and their learning with the best possible outcomes for everyone.

### ***Consultation, Compliance and Policies***

5. Availability of a pool of specialist Trade Union representatives able to consult meaningfully with the Local Authority on proposed changes to HR policies on behalf of all maintained schools. This saves individual schools having to consult with the Trade Unions independently.
6. Assurance that model employment policies issued by Havering LA have been through formal negotiation and consultation with Havering Division/Branch Trade Union officials

### ***Employee Relations***

7. Employees' concerns and grievances are addressed informally wherever possible, in a way which prevents sensitive issues escalating into confrontation involving contracted formal procedures. This can be extremely costly in both senior leadership time and money as well as emotionally for all involved.
8. Matters are often addressed without recourse to regional officials.
9. Where the involvement of regional or national officials is required, named contact details are provided promptly by local reps.
10. Genuine support for the well-being of staff, through positive and productive working relationships.

### ***Restructuring and Reorganisation***

11. Specific support for staff restructurings and budget saving options.
12. Discussion about alternative individual employment options, including settlement agreements.

### ***TUPE and Academy Conversion***

13. Meaningful consultation over academy conversion.

Branch secretaries, whose facility time is funded through de-delegation are senior and experienced Trade Union representatives with a good level of knowledge and expertise on employment matters.

## **Responsibilities held for maintained schools only**

### **Statutory and regulatory duties**

- Functions of LA related to best value and provision of advice to governing bodies in procuring goods and services (Sch 2, 59)
- Budgeting and accounting functions relating to maintained schools (Sch 2, 75)
- Authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Sch 2, 60)
- Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Sch 2, 61)
- Internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of LGA 1972 for maintained schools (Sch 2, 62)
- Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 2, 63)
- 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 (Sch 2, 64)
- 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 (Sch 2, 65)
- Retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Sch 2, 78)
- HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Sch 2, 67); determination of conditions of service for non-teaching staff (Sch 2, 67); appointment or dismissal of employee functions (Sch 2, 67)
- Consultation costs relating to staffing (Sch 2, 69)
- Compliance with duties under Health and Safety at Work Act (Sch 2, 70)
- Provision of information to or at the request of the Crown relating to schools (Sch 2, 71)
- School companies (Sch 2, 72)
- Functions under the Equality Act 2010 (Sch 2, 73)
- Establish and maintaining computer systems, including data storage (Sch 2, 74)
- Appointment of governors and payment of governor expenses (Sch 2, 75)

### **Education welfare**

- Inspection of attendance registers (Sch 2, 81)

## **Asset management**

- General landlord duties for all maintained schools (Sch 2, 79a & b (section 542(2)) Education Act 1996; School Premises 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 (Sch 2, 55)
- Provision of tuition in music, or on other music-related activities (Sch 2, 56)
- Visual, creative and performing arts (Sch 2, 57)
- Outdoor education centres (but not centres mainly for the provision of organised games, swimming or athletics) (Sch 2, 58)

## **Premature retirement and redundancy**

- Dismissal or premature retirement when costs cannot be charged to maintained schools (Sch 2, 78)

## **Monitoring national curriculum assessment**

- Monitoring of National Curriculum assessments (Sch 2, 77)

## **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 1998 Act (financing of maintained schools), the administration of grants to the local authority (including preparation of applications) and, where it's 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

## **Core school improvement activities**

In January 2022, the DfE announced that the School Improvement, Monitoring and Brokerage Grant paid to local authorities would be reduced by 50% for financial year 2022/23 and then removed completely from 2023-24.

At the same time, local authorities (LAs) were given the power to fund all improvement activity, including core activity, via de-delegation with the agreement of schools forums or the Secretary of State.

## **Rationale for maintaining core school improvement activities**

During the Summer term, the LA worked with a group of school and academy leaders to refresh its Quality Assurance (QA) Framework. A key objective of the LA is that all children will attend a school this is judged to be Good or Outstanding by Ofsted. To support the maintenance of high standards, all LA maintained schools will be included in the QA cycle.

Following the pattern set by Ofsted of inspecting Good or Outstanding schools every five years, the LA proposes a five-year cycle of QA where schools retain a judgement of unreservedly Good or Outstanding. If graded Requires Improvement following a Graded Inspection, or the evidence gathered during an Ungraded Inspection suggests that the grade may be lower than Good if a Graded Inspection was to be carried out, then the school will become subject to 'Requiring Additional Support and Intervention' by the LA in the case of maintained schools.

For maintained schools (and academies by election), where a school is considered vulnerable and 'Requiring Additional Intervention & Support', the school relevant LA officers will discuss the situation fully with the Headteacher/Executive Headteacher/Principal and the Chair of Governors.

Where a school is judged to be 'Requiring Additional Intervention & Support':

- Progress Review Meetings (PRMs) will be implemented following an Ofsted grading less than good, or suggestion that it will be less than good following an Ungraded inspection.
- If significant risk is identified, this will lead to a full school or area review, and the school will be subject to regular PRMs.

The purpose of PRMs is for the LA to:

- oversee the implementation of action plans to secure rapid and sustained improvements, so are likely to be 'front-loaded' with more frequent meetings at the outset.
- monitor progress of actions taken to ensure they have maximum impact.
- commission additional resources when needed to support rapid improvement.
- monitor the impact of brokered support, including partnership support.
- where possible, gather direct evidence of progress for LA monitoring and reporting to Schools' Funding Forum' and for Ofsted.

Prior to the pandemic an average of 12 schools have been designated as a 'School Causing Concern' (or as 'Requiring Additional Intervention & Support' under the revised QA

Framework) in each academic year. Of these, an average of 8 schools have been maintained schools, and therefore have been subject to regular PRM's. In addition to PRMs, these schools have also received in-school support, including a full school or area review. These have ranged from reviews of the whole phase, such as Early Years, to targeted areas such as SEN or Reading.

This number of schools subject to PRMs and direct intervention fell due to the pandemic, and the subsequent reduction in Ofsted inspections and QA visits in schools. With increased inspection activity and focus on Ofsted in schools, we are expecting the number to increase to around 14 schools 'Requiring Additional Intervention & Support' and therefore subject to PRMs and/or further in-school support.

When schools are subject to PRMs, this is generally because they are at risk of not retaining their 'Good' or better Ofsted judgement at their next inspection. Over the past five years, the PRM process has proven to be effective, with currently 100% of maintained schools being graded as 'Good' or better by Ofsted. This includes schools which have been subject to PRMs and have been inspected over the period they have been under some form of intervention.

### **The offer for LA-maintained primaries**

PRMs will be resourced for maintained schools by the LA as part of their statutory QA offer and funded from Core Council funding.

However, further in-school support such as a full school review, or review of an area of the school's practice, would be chargeable if deemed that the school is a vulnerable school, and it is proposed that this would be charged to the de-delegated 'School Improvement Monitoring and Brokering Grant' (subject to Schools' Funding Forum approval). Spend will be reported to Schools' Funding Forum in the same way as the Schools Partnership and Schools Causing Concern Fund has been in the past.

Any underspends at year end can be carried forward, or re-distributed, subject to Funding Forum approval.

**Subject Heading:**

**Schools Funding 2025-26**

**Report Author:**

**Hany Moussa – Principal Education  
Finance Officer**

**Eligibility to vote:**

**All school and academy members**

### **SUMMARY**

This report summarises the local projection of the indicative DSG Schools Block funding for financial year 2025-26, options on allocating funding to schools, including a transfer to the High Needs Block and to funding for growth and falling rolls.

### **RECOMMENDATIONS**

1. That Schools Funding Forum notes the update on schools funding for 2025-26
2. That Schools Funding Forum agrees to apply the national funding formula rates to schools data in calculating schools' funding
3. For LA maintained primary school representatives; to consider whether to continue with the de-delegation of funding for the following services:
  - (i) Insurance
  - (ii) Free school meals eligibility checking
  - (iii) Maternity leave insurance
  - (iv) EAL service
  - (v) Behaviour support service
4. For LA maintained primary and special school representatives; to consider the de-delegation of funding for the following:
  - (i) Statutory and regulatory duties
  - (ii) Core school improvement activities



## REPORT DETAIL

### 1. Background

Financial year 2018-19 saw the implementation of a “soft” National Funding Formula and for that year and subsequently Havering has used the NFF rates in calculating funding for its schools. For each of those years decisions have been made by the Schools Funding Forum on the minimum funding guarantee (MFG) and the gains caps to be applied. For 2024-25, the MFG was set at +0.5% and there was a gains cap of 2.5%. This was after using £146,444 of the Schools Block to support the Pupil Growth/Falling Rolls Fund and after £1,188,080 was transferred to the High Needs Block.

### 2. DSG Schools Block 2025-26

Although the DSG allocations for 2025-26 has been delayed, the following grants will be included in the Schools Block allocation and NFF rates:

- The Teachers’ Pay Additional Grant (TPAG)
- Teachers’ Pension Employer Contribution Grant (TPECG)
- Core Schools Budget Grant (CSBG)

The grants will be rolled onto the National Funding formula by:

- Adding an amount representing what schools receive into the baseline budgets
- Adding the value of the lump sum, basic per pupil rates and FSM Ever 6 parts of the grant into the respective NFF factors.

These amounts are shown on **Appendix A** in the minimum NFF funding rates to be used in 2025-26 formula and those used for 2024-25.

Local authorities not already using NFF funding rates will be required to bring their own formula closer to the schools NFF. Havering already uses NFF factors and rates.

### 3. Funding for 2025-26

The DfE is due to publish NFF allocations for schools and all supporting documents on the NFF (including the schools operational guide and NFF technical note), for 2025 to 2026 as soon as possible following the budget announcement on 30 October 2024. The dedicated schools grant (DSG) allocations will then be published in December 2024.

### 4. Schools Formula Consultation option

For 2025-26 it is again recommended that Havering adopts the NFF funding rates and the Forum will again be asked to consider proposals for the level of the minimum funding guarantee, whether to apply a gains cap and if so at what rate. Consideration will again need to be given to any top up that is required to Havering’s allocation of funding for pupil growth and falling rolls and to any transfer of funding to support high needs expenditure.

## **4.1 School Funding Options**

Havering has been an early adopter of the NFF rates since its inception in 2018-19, and the LA is proposing to continue to use the NFF rates (including Area Cost Adjustment) to fund Havering schools.

Havering has had a 0.5% minimum funding guarantee (MFG) for 2024-25, and the LA is proposing to continue with funding the maximum permitted minimum funding guarantee of 0.5% to ensure that every school has at least a 0.5% increase in their funding to the MFG unit.

For financial year 2024-25, there is a cap in place of 2.5%, which ensures that the commitments for £1,188,080 (0.50%) transferred to the DSG High Needs Block, and £146,444 is used to support Pupil Growth and Falling rolls in addition to the £2,065,774 funding received for this.

Should members of the School Forum agree for the continuation of using the NFF factors and rates to allocate funding to schools, then the options to be consulted on and considered, are whether to transfer funding from the Schools Block to the High Needs Block, transfer to the Growth Fund, the level of the minimum funding guarantee and the level of any gains cap.

## **4.2 Transfers between DSG blocks and schools' High Needs funding**

For 2024-25, with the agreement of the Schools' Funding Forum, Havering was able to transfer up to 0.5% of their Schools Block to the High Needs block, totalling £1,188,080.

The Forum agreed at the meeting held on 13th June 2023 to re-establish the High Needs Funding task and finish group in order to review high needs funding rates for 2024-25 and 2025-26. When the high needs funding rates for 2022-23 to 2024-25 were determined, the 0.5% transferred from the School Block was included in the calculations. Without a similar 0.5% transfer for 2025-26, the base rates forming the starting point for discussion of 2024-25 rates, would need to be reduced to reflect the absence of the funding transferred.

The transfer from the Schools Block to the High Needs Block for 2024-25 enabled the hourly rate in support of pupils with an EHCP to be increased from £16.50 an hour after 9.3 hours, to £17.00 an after 9.0 hours. The transfer also enabled the funding for each top-up place to rise by 3.0%.

## **5. Pupil Growth and Falling Rolls Fund**

Funding for growth and falling rolls is calculated by looking at the change in pupil numbers in Middle Layer Super Output Areas (MSOA), a geographical area defined by postcode, between October 2023 and October 2024. The DfE will notify LAs of allocations for 2025-26 in December 2024.

After falling for several years, Havering's funding remained stable in 2024-25 and is expected to remain at the same level in 2025-26.

|         |        |
|---------|--------|
| 2019-20 | £2.5m  |
| 2020-21 | £1.6m  |
| 2021-22 | £1.6m  |
| 2022-23 | £1.5m  |
| 2023-24 | £2.0m  |
| 2024-25 | £2.0m  |
| 2025-26 | £2.0m* |

\* The figure for 2025-26 is an LA estimate.

It is proposed that School Forum members agree the transfer of £300k from the Schools Block to support the Growth and Falling Rolls Fund for 2025-26 to support the revision of the scheme as outlined below.

## 5.1 Growth

Havering's formula for allocating growth funding for financial year 2024-25 is as follows:

### Primary

Single form of entry expansion or bulge class

28 pupils x AWPU £3,684.29 = £103,160

Cost in financial year 2024-25 (7/12 September to March) = £60,177

This is repeated as the cohort moves through the school to recognise the need to open an additional class and appoint additional staff until the school has reached its new PAN in every year group.

If a bulge classes fills, the following year it will be funded by the pupils on roll. If it does not fill funding is topped up to 28 pupils.

It is proposed for 2025-26, this part of the Growth fund to be updated for 2024-25 KS1&2 funding rate of £3,859.50.

### Secondary

Expansion or bulge class

Smaller increases in numbers are expected to be absorbed into existing classes. This is reflected in the pupil numbers funded as follows, using an example of an increase in PAN from 180 to 210.

Increase = 30 less 1 pupil absorbed into each of the existing 6 classes = 24 to be funded

e.g. 24 pupils x AWPU £5,194.26 = £124,662

Cost in financial year 2024-25 (7/12 September to March) = £72,720

This is repeated as the cohort moves through the school to recognise the need to open an additional class and appoint additional staff until the school has reached its new PAN in every year group.

It is proposed for 2025-26, this part of the Growth fund to be updated for 2024-25 KS3 funding rate of £5,441.44.

## 5.2 Falling rolls

- A) From 2024-25 funding is no longer restricted to schools that are good or outstanding, however, it must be demonstrated that the capacity will be required within three years.

Havering's formula from 2024-25 is as follows:

PAN x 85% minus NOR in intake year (YrR/Yr3/Yr7) x AWPU x 90%  
Plus  
PAN x 85% minus NOR in intake year +1 (Yr1/Yr4/Yr8) x AWPU x 50%

If a school is 30 or more pupils below PAN funding will be based on 85% of the next multiple of 30 above the number on roll, and not the PAN. For example if a school has a PAN of 90 pupils and admits 50 then the school would be funded to 85% of 60 and not 85% of 90.

For 2025-26, it is proposed to align the rates funded for each pupil that is applicable for the falling rolls to be at 100%, for the 85% multiplier to be amended to reflect 28 pupils to be funded in a class for Primary and 24 pupils to be funded in Secondary, and for the AWPU to be updated to reflect 2024-25 rates for KS1&2 and KS3.

Based on 2024-25 funding for Growth, this will be affordable and can be funded from the current budget available for Growth and will cost circa £257k.

The revised formula will be as follows for 2025-26:

Reception and Year 1 (Primaries and Infant schools) and Year 3 and 4 (Junior schools only):

$$\text{PAN} / 30 \times 28 \text{ minus NOR in intake year} \times \text{AWPU KS1\&2}$$

Years 7 and 8 (Secondary schools only):

$$\text{PAN} / 30 \times 24 \text{ minus NOR in intake year} \times \text{AWPU KS3}$$

- B) Havering also has local arrangements that support primary schools that have significantly and consistently low numbers in some year groups, which operates similar to the Expansion methodology.

Years 2 to 6 (Primary and Infant schools) and Year 5 and 6 (Junior schools only):

$$\text{PAN} / 30 \times 28 \text{ minus NOR in intake year} \times \text{AWPU KS1\&2}$$

Havering is an outlier in having an increase in demand for primary school places, in comparison to other London and neighbouring LAs. As a result of the increased demand, discussions and arrangements are being made for places across the borough in anticipation of the increased demand. Presently costs cannot be calculated until the discussions have concluded, which is anticipated to be by the end of the Autumn term.

However, it is not anticipated to be above the current year budget of £2.3m, and a breakdown for financial year 2025-26 arrangements will be provided once places have been confirmed for the next academic year and pupil numbers are known to review for the Falling Rolls calculation.

### 5.3 Growth Proposal for 2024-25 and 2025-26

In financial year 2024-25, the Growth and Falling Rolls Fund is £2.455m as per the breakdown below.

|                                       |                  |
|---------------------------------------|------------------|
| School Block Grant – Growth           | 2,065,774        |
| Transfer from Schools Block to Growth | 146,444          |
| Academy Growth (Summer Term)          | 242,952          |
| <b>Total available for 2024-25</b>    | <b>2,455,170</b> |

Based on the current anticipated demand and projections for the current financial year, the spend for Growth and Falling Rolls Fund is anticipated to underspend by £262k with a spend of £2.192m for the current plans in place to support Admissions to place children in schools across Havering.

| Scheme                               | Total            | Primary          | Secondary      | No. of Primaries | No. of Secondaries |
|--------------------------------------|------------------|------------------|----------------|------------------|--------------------|
| Infant Class Size                    | 51,580           | 51,580           | 0              | 1                | 0                  |
| Previous Year Expansion (Apr-Aug)    | 242,952          | 122,064          | 120,888        | 2                | 3                  |
| Previous Year Expansion (Sep-Mar)    | 180,530          | 180,530          | 0              | 2                | 0                  |
| Previous Year Bulge Class            | 122,072          | 122,072          | 0              | 3                | 0                  |
| Bulge - PAN funding (Apr24 to Aug24) | 64,475           | 64,475           | 0              | 1                | 0                  |
| September 2024 New Bulge Class       | 303,561          | 227,812          | 75,750         | 3                | 1                  |
| Unfilled Places                      | 889,054          | 889,054          | 0              | 23               | 0                  |
| Falling Rolls Support Fund:          | 193,935          | 193,935          | 0              | 12               | 0                  |
| Growth - in-year admission (ICS)     | 144,083          | 144,083          | 0              | n/a              | n/a                |
| <b>Total</b>                         | <b>2,192,243</b> | <b>1,995,605</b> | <b>196,638</b> | <b>30</b>        | <b>4</b>           |

|                                    |                |
|------------------------------------|----------------|
| <b>Anticipated outturn balance</b> | <b>262,927</b> |
|------------------------------------|----------------|

As outlined in 5.2A for the revision of the Falling Rolls methodology, the full year cost of implementation is £256k, and School Forum members views are sought on whether to bring the amendment to be put in place for the financial year 2024-25 arrangements. The revised spend of the Growth and Falling Rolls Fund will be as follows:

| <b>Scheme</b>  | <b>Total</b>     | <b>Primary</b>   | <b>Secondary</b> | <b>No. of<br/>Primarys</b> | <b>No.of<br/>Secondaries</b> |
|--|------------------|------------------|------------------|----------------------------|------------------------------|
| Infant Class Size  | 51,580           | 51,580           | 0                | 1                          | 0                            |
| Previous Year Expansion (Apr-Aug)                                  | 242,952          | 122,064          | 120,888          | 2                          | 3                            |
| Previous Year Expansion (Sep-Mar)                                  | 180,530          | 180,530          | 0                | 2                          | 0                            |
| Previous Year Bulge Class  | 122,072          | 122,072          | 0                | 3                          | 0                            |
| Bulge - PAN funding (Apr24 to Aug24)                               | 64,475           | 64,475           | 0                | 1                          | 0                            |
| Unfilled Places - Maintained (12/12) & Academies (AY24-25 funding) | 889,054          | 889,054          | 0                | 23                         | 0                            |
| September 2024 New Bulge Class                                     | 303,561          | 227,812          | 75,750           | 3                          | 1                            |
| Falling Rolls Support Fund:  | 450,906          | 450,906          | 0                | 12                         | 0                            |
| Growth - in-year admission (ICS)                                   | 144,083          | 144,083          | 0                | n/a                        | n/a                          |
| <b>Total</b>   | <b>2,449,215</b> | <b>2,252,577</b> | <b>196,638</b>   | <b>30</b>                  | <b>4</b>                     |

|                                    |              |
|------------------------------------|--------------|
| <b>Anticipated outturn balance</b> | <b>5,956</b> |
|------------------------------------|--------------|

There are ten schools that will get additional funding from the revision this year, with an average of £25k per school affected, that ranges from £3.5k to £53.7k for affected schools.

## **6. De-delegation (Maintained Schools)**

Funding for de-delegated services must be allocated to schools through the formula but can be passed back, or 'de-delegated', for maintained mainstream primary and secondary schools with Schools Forum approval.

De-delegation for centrally provided services is not an option for academies, special schools, nursery schools and PRUs. De-delegation for education functions can be applied to special schools.

Where de-delegation has been agreed for maintained primary and secondary schools the local authority can offer the service on a buy-back basis to those schools and academies in their area which are not covered by the de-delegation.

Any decisions made to de-delegate in 2025-26 relate to that year only, so new decisions will be required for any service to be de-delegated in 2026-27.

Schools forum members decide separately for each phase whether the service should be provided centrally and the decision will apply to all maintained mainstream schools in that phase. Funding for these services will then be subtracted from the formula allocation before school budgets are issued.

The services which can be de-delegated are:

- contingencies (including schools in financial difficulties and deficits of closing schools)
- behaviour support services
- support to underperforming ethnic groups and bilingual learners (EAL)
- free school meals eligibility
- insurance
- museum and library services
- licences/subscriptions
- staff costs supply cover (for example, long-term sickness, maternity, trade union and public duties)

For each service de-delegated, local authorities will need to make a clear statement of how the funding is being taken out of the formula (for example, primary insurance £20 per pupil, FSM eligibility £9.50 per FSM pupil). There should be a clear statement of how contingencies and other resources will be allocated.

Where there has been agreement that a school is entitled to receive an allocation from a de-delegated contingency fund, that agreement should be honoured if the school converts to an academy at any point in the year. Where a school converts to an academy in the period 2<sup>nd</sup> April to 1<sup>st</sup> September 2025, local authorities will have an opportunity to present an evidence based case to the EFA to request a recoupment adjustment for the period 2<sup>nd</sup> September 2025 to 31<sup>st</sup> March 2026.

Any unspent de-delegated funding remaining at the year-end should be reported to Schools Forum. Funding may be carried forward to the following funding year as with any other centrally retained budget, and local authorities can choose to use it specifically for de-delegated services.

### **Services for which de-delegation is requested – applicable to LA maintained primary schools only**

#### **6.1 Insurance**

Insurance for maintained schools is arranged as part of the Borough's main insurance contract and funded through de-delegation.

|                |          |
|----------------|----------|
| 2025-26        | Primary  |
| Formula factor | AWPU     |
| Amount         | £21.00   |
| Total          | £363,000 |

|         |        |
|---------|--------|
| 2024-25 | £21.00 |
|---------|--------|

The LA is proposing that the sum per pupil de-delegated remains unchanged.

It should be noted that the cost of participating in the Risk Protection Arrangement (RPA), managed by the Department for Education, has been set at £25.00 per pupil for 2025-26.

## 6.2 Free school meals eligibility checking

This service checks the eligibility of children for free school meals and pupil premium grant by accessing a central government hub. Without this service schools would need to make their own arrangements to determine eligibility.

The proposed funding through de-delegation from LA maintained primary schools is as follows:

|                |                     |
|----------------|---------------------|
| 2025-26        | Primary             |
| Formula factor | FSM eligible pupils |
| Amount         | £9.50               |
| Total          | £30,352             |

|              |       |
|--------------|-------|
| 2024-25 rate | £9.50 |
|--------------|-------|

The LA is proposing that the sum per FSM pupil de-delegated remains unchanged. An increase in the total de-delegated, resulting from an increased number of FSM eligible pupils, should be sufficient to cover the cost of the pay award for staff delivering this service.

## 6.3 Maternity leave insurance

The LA administers an insurance scheme that meets the costs of teachers and support staff who are on maternity leave. The benefit of de-delegating the budget, rather than operating a traded service, is that schools do not have to pay premiums or make claims.

If the funding is not de-delegated, schools would need to make individual choices to buy into the scheme which, if some schools decided not to, may make it unviable to run. This service is not offered to academies.

With increases in demand and to the salary costs for teachers and support staff for the forthcoming financial year, it is proposed to increase the sum per pupil de-delegated for maternity leave by 9.6% in 2025-26. This is to meet the expected average increase in staff salaries, as staff salaries determine the level of maternity leave payments.

The proposed funding through de-delegation from LA maintained primary schools is as follows:



|                |          |
|----------------|----------|
| 2025-26        | Primary  |
| Formula factor | AWPU     |
| Amount         | £40.49   |
| Total          | £707,198 |

|         |        |
|---------|--------|
| 2024-25 | £36.96 |
|---------|--------|

The table below outlines the budget and expenditure from 2023-24 to 2025-26, should the de-delegation be agreed at the levels requested, and the impact on each of the corresponding years. For 2024-25, although the expected spend is in excess of the budget available, there are other de-delegated budgets which are anticipated to underspend to offset this increased demand. For 2025-26, it is anticipated that a similar situation will arise and the anticipated £10k shortfall may not pose a material impact on the agreed overall de-delegated budgets.

|                   | 2023-24  | 2024-25         | 2025-26*        |
|-------------------|----------|-----------------|-----------------|
| Budget            | £602,693 | £645,543        | <b>£707,198</b> |
| Spend             | £528,751 | <b>£680,000</b> | <b>£717,400</b> |
| Outturn           | £73,942  | -£34,457        | <b>-£10,202</b> |
| Rate              | £34.87   | £36.96          | <b>£40.49</b>   |
| Applicable pupils | 17284    | 17466           | <b>17466</b>    |

#### 6.4 EAL service

An explanation of the service offered through de-delegation is attached at **Appendix B**.

Funding requested through de-delegation from LA maintained primary schools is as follows:

|                |          |
|----------------|----------|
| 2025-26        | Primary  |
| Formula factor | EAL 3    |
| Amount         | £38.00   |
| Total          | £114,538 |

|         |        |
|---------|--------|
| 2024-25 | £38.00 |
|---------|--------|

The range in sums de-delegated from each school is shown below. The majority of schools would benefit financially from de-delegation compared to the cost of buying a similar level of service.

|         | De-delegated from individual schools<br>£ |
|---------|---|
| Lowest  | 517                                       |
| Median  | 2,644                                     |
| Highest | 6,070                                     |

## 6.5 Behaviour support service - Social Emotional and Mental Health Team (SEMH Team)

The LA is seeking de-delegation for SEMH services which now form part of SEND Education Support Service (formerly CAD 5 to 19).

De-delegated funding will be used to provide an enhanced resource of School Support Family Practitioners (SSFPs), meaning that this will be provided to maintained schools without an additional charge.

The primary purpose of this service is to work closely with families of vulnerable children with SEMH needs, to prevent permanent exclusion and suspension, maintain placement and positive working relationships between home and school. The service will also provide early intervention work with children and parents. SSFPs work in a similar way to family practitioners within Early Help, but with a strong focus on educational outcomes alongside family support.

Details of the service provided and job profiles for the posts of senior school support family practitioners are attached at **Appendix C**.

The proposal is that for 2025-26 the sums de-delegated remain unaltered:

Funding required through de-delegation from LA maintained primary schools is as follows:

| Formula factor | AWPU    | FSM Ever 6 | IDACI E | IDACI D | IDACI C | IDACI B | IDACI A | Low attainment |          |
|----------------|---------|------------|---------|---------|---------|---------|---------|----------------|----------|
| Amount         | £5.00   | £2.00      | £14.08  | £22.08  | £12.05  | £7.71   | £10.07  | £5.00          |          |
| Total          | £87,330 | £6,452     | £31,590 | £29,975 | £6,618  | £4,365  | £1,189  | £27,965        | £195,483 |

|               |       |       |        |        |        |       |        |       |  |
|---------------|-------|-------|--------|--------|--------|-------|--------|-------|--|
| 2024-25 rates | £5.00 | £2.00 | £14.08 | £22.08 | £12.05 | £7.71 | £10.07 | £5.00 |  |
|---------------|-------|-------|--------|--------|--------|-------|--------|-------|--|

## 6.6 Trade Union Facility Time

De-delegation benefits schools through the provision of support from locally based and accredited trade union officials. Further details on what is provided are contained in **Appendix D**.

The following unions and the staff they support are as follows:

| Union  | Staff Supported    |
|--|--------------------|
| National Education Union (NEU)   | Teaching & Support |
| National Association of Schoolmasters Union of Women Teachers (NASUWT) | Teaching           |
| Community  | Teaching           |
| National Association of Head Teachers (NAHT)                           | Teaching           |
| Association of School and College Leaders (ASCL)                       | Teaching           |
| UNISON   | Support            |
| GMB  | Support            |

Last year the Forum agreed an increase in the sum per pupil de-delegated from £2.63 to £2.80 to help meet the rise in salary costs of the local trade union representatives delivering the service.

If the price remained unchanged the figures for 2025-26 would be as follows.

|                |         |
|----------------|---------|
| 2025-26        | Primary |
| Formula factor | AWPU    |
| Amount         | £2.80   |
| Total          | £48,905 |

|         |       |
|---------|-------|
| 2024-25 | £2.80 |
|---------|-------|

Shown below are the figures if the sum per pupil was increased by 5.5% in line with the proposed rise in teachers' pay. This would bring the per pupil amount to £2.80. The figures would be as follows.

|                |         |
|----------------|---------|
| 2025-26        | Primary |
| Formula factor | AWPU    |
| Amount         | £2.96   |
| Total          | £51,700 |

## Education functions – applicable to LA maintained primary and special schools only

### 6.7 Statutory and regulatory duties

The Schools Funding Forum has previously received reports on the withdrawal of the Education Services Grant (ESG) which was allocated to local authorities by the Government for the provision of statutory services in relation to schools. Academies also received ESG. That has also ceased.

The reports advised that from an original allocation of £2.3m, £589k had been transferred to the DSG leaving no funding source to meet the remaining costs. After reducing its operational costs by £590k this left a shortfall of £1.2m.

In reducing the funding to local authorities, the DFE introduced a provision within the School Funding Regulations for local authorities to agree a contribution from LA maintained schools towards the cost of statutory services and specific tasks that are carried out for them but not for academies. This principle reflects the charge that most Multi Academy Trusts place on their partner academies for central services.

The contribution from LA maintained schools budgets' was introduced for the 2018-19 financial year and was set at £19.89 per pupil for primary schools and £44.00 per place for special schools. The primary school rate was reduced to £17.90 for 2019-20. For the last three years the rate has been increased in line with the rise in NFF factor values and currently stands at £19.31 for mainstream schools and £45.00 for each special school place.

For 2025-26 the LA is again proposing that the rate for LA maintained primary schools is increased in line with the rise in NFF factor values, excluding any increases due to any grants rolling into the NFF rates.

The cost of providing the services supported by this funding is comprised largely of staff salaries that are expected to rise by at least 5% this year.

The new rate would produce a minimum total contribution of £341,000, as outlined in the table below that demonstrates the 2024-25 contribution.

|                |          |         |
|----------------|----------|---------|
| 2024-25        | Primary  | Special |
| Formula factor | AWPU     | Place   |
| Amount         | £19.31   | £45.00  |
| Total          | £334,000 | £7,000  |

A list of the different LA responsibilities for maintained schools that may be funded from this contribution is attached at **Appendix E**.

## 6.8 Core school improvement activities

In January 2022 the DfE announced that the School Improvement, Monitoring and Brokerage Grant paid to local authorities would be reduced by 50% for financial year 2022-23 and then removed completely from 2023-24.

At the same time, local authorities were given the power to fund all improvement activity, including core activity, via de-delegation with the agreement of Schools Forums or the Secretary of State.

At the February 2022 meeting of the Schools Funding Forum, the members representing LA maintained schools agreed the de-delegation of £5.11 per pupil for core school improvement activities for the financial year 2022-23. This generated a sum equivalent to the 50% of the grant that was withdrawn.

During the summer term 2022, the LA worked with a group of school and academy leaders to refresh its Quality Assurance (QA) Framework. A key objective of the LA is that all children will attend a school this is judged to be Good or Outstanding by Ofsted. To support the maintenance of high standards, all LA maintained schools will be included in the QA cycle.

Following on from this, the core school improvement activities to be funded from de-delegation were determined. For 2023-24, the LA proposed that the sum de-delegated should remain at £5.11 per pupil ensuring schools would be asked to contribute only 50% of the grant withdrawn. At the meeting of the Forum held on 1<sup>st</sup> December 2022 the LA maintained primary school representatives agreed to de-delegation.

For 2024-25, the LA sought the de-delegation of £5.11 per pupil which generates 50% of the DfE grant withdrawn. School Forum representatives for maintained schools agreed for the de-delegation to remain unchanged.

For 2025-26, despite increased costs, we may be able to reduce the spend by £30,000, by delivering more of the intervention work internally, rather than via external resource.

For 2025-26 the LA is proposing the de-delegation for School Improvement activities to be reduced from £5.11 per pupil to £3.38 per pupil.

Details of the service provided are shown in **Appendix F**.

|                |         |         |
|----------------|---------|---------|
| 2025-26        | Primary | Special |
| Formula factor | AWPU    | Place   |
| Amount         | £3.38   | £10.14  |
| Total          | £58,406 | £1,587  |

|         |       |        |
|---------|-------|--------|
| 2024-25 | £5.11 | £15.33 |
|---------|-------|--------|

High Needs Forecast 2024-25

|  | FY24-25                              |                               |         |         |         | FY24-25                       |                               |                               |                               |                               | FY23-24                       |                               |     |        |       | In-Year Change<br>FY24-25 Pd 3 to FY24-25<br>Pd 6 change |  | Year on Year Change<br>FY23-24 to FY24-25 Pd 6<br>change |  |
|--|--------------------------------------|-------------------------------|---------|---------|---------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-----|--------|-------|--|--|--|--|
|  | Summary September 2024               |                               |         |         |         | Summary June 2024             |                               |                               |                               |                               | Summary October 2023          |                               |     |        |       |  |  |  |  |
|  | £000                                 |                               |         |         |         | £000                          |                               |                               |                               |                               | £000                          |                               |     |        |       |  |  |  |  |
|  | Funding allocation before recoupment | 45,209                        |         |         |         | 44,789                        |                               |                               |                               | 40,630                        |                               |                               |     | 420    | 4,579 |  |  |  |  |
|  | Available funding after recoupment   | 39,914                        |         |         |         | 39,472                        |                               |                               |                               | 37,684                        |                               |                               | 442 | 2,229  |       |  |  |  |  |
|  | Deficit cfwd from previous year      | -15,322                       |         |         |         | -15,322                       |                               |                               |                               | -8,493                        |                               |                               | 0   | -6,829 |       |  |  |  |  |
|  | Transfer from Schools Block          | 1,188                         |         |         |         | 1,188                         |                               |                               |                               | 1,109                         |                               |                               | 0   | 79     |       |  |  |  |  |
|  | Total funding for the financial year | 25,780                        |         |         |         | 25,338                        |                               |                               |                               | 30,300                        |                               |                               | 442 | -4,520 |       |  |  |  |  |
|  |                                      |                               |         |         |         |                               |                               |                               |                               |                               |                               |                               |     | 0      |       |  |  |  |  |
|  | Estimated Expenditure<br>£000        | No of Pupils/Places supported |         |         |         | Estimated Expenditure<br>£000 | Estimated Expenditure<br>£000 | Estimated Expenditure<br>£000 | Estimated Expenditure<br>£000 | Estimated Expenditure<br>£000 | Estimated Expenditure<br>£000 | Estimated Expenditure<br>£000 |     |        |       |  |  |  |  |
|  |                                      | Pre 16                        |         | Post 16 |         |                               |                               |                               |                               |                               |                               |                               |     |        |       |  |  |  |  |
|  |                                      | Apr-Aug                       | Sep-Mar | Apr-Aug | Sep-Mar |                               |                               |                               |                               |                               |                               |                               |     |        |       |  |  |  |  |
| Having Special Schools                               | 15,198                               | 301                           | 331     | 74      | 87      | 15,342                        | 13,486                        | -144                          | 1,711                         |                               |                               |                               |     |        |       |  |  |  |  |
| Direct Expenditure                                   | 141                                  |                               |         |         |         | 143                           | 107                           | -2                            | 34                            |                               |                               |                               |     |        |       |  |  |  |  |
| Expenditure on therapies                             | 318                                  |                               |         |         |         | 261                           | 375                           | 57                            | -57                           |                               |                               |                               |     |        |       |  |  |  |  |
| Direct Payments                                      | 430                                  |                               |         |         |         | 430                           | 158                           | 0                             | 272                           |                               |                               |                               |     |        |       |  |  |  |  |
|  |                                      |                               |         |         |         |                               |                               | 0                             | 0                             |                               |                               |                               |     |        |       |  |  |  |  |
| Out of Borough Maintained Special Schools            | 2,000                                | 70                            | 82      |         |         | 1,950                         | 1,650                         | 0                             | 350                           |                               |                               |                               |     |        |       |  |  |  |  |
| Revised In-Borough Primary Top-up                    | 15,153                               | 967                           | 894     |         |         | 16,654                        | 9,637                         | -1,501                        | 5,516                         |                               |                               |                               |     |        |       |  |  |  |  |
| Out of Borough Mainstream Primary                    | 458                                  | 139                           | 162     |         |         | 675                           | 403                           | -217                          | 55                            |                               |                               |                               |     |        |       |  |  |  |  |
| Expenditure on alternative tuition                   | 156                                  |                               |         |         |         | 217                           | 186                           | -61                           | -30                           |                               |                               |                               |     |        |       |  |  |  |  |
| In year EHC Plans                                    | 270                                  |                               | 25      |         |         | 209                           | 430                           | 61                            | -160                          |                               |                               |                               |     |        |       |  |  |  |  |
| Total Primary High Needs funding                     | 16,037                               | 1,106                         | 1,081   |         |         | 17,755                        | 10,656                        | -                             | 1,718                         |                               |                               |                               |     |        |       |  |  |  |  |
|  |                                      |                               |         |         |         |                               |                               |                               |                               |                               |                               |                               |     |        |       |  |  |  |  |
| Revised In-Borough Secondary Top-up                  | 7,184                                | 479                           | 504     |         |         | 7,382                         | 4,904                         | 0                             | 2,280                         |                               |                               |                               |     |        |       |  |  |  |  |
| Out of Borough Mainstream Secondary                  | 235                                  | 31                            | 36      |         |         | 400                           | 212                           | -165                          | 23                            |                               |                               |                               |     |        |       |  |  |  |  |
| Expenditure on alternative tuition                   | 141                                  |                               |         |         |         | 187                           | 524                           | -46                           | -383                          |                               |                               |                               |     |        |       |  |  |  |  |
| In year EHC Plans                                    | 141                                  |                               | 20      |         |         | 209                           | 131                           | -68                           | 10                            |                               |                               |                               |     |        |       |  |  |  |  |
| Total Secondary High Needs funding                   | 7,701                                | 510                           | 560     |         |         | 8,178                         | 5,771                         | 0                             | 1,930                         |                               |                               |                               |     |        |       |  |  |  |  |
|  |                                      |                               |         |         |         |                               |                               |                               |                               |                               |                               |                               |     |        |       |  |  |  |  |
| Schools with high nos. of pupils with SEN            | 598                                  |                               |         |         |         | 598                           | 837                           | 0                             | -239                          |                               |                               |                               |     |        |       |  |  |  |  |
|  |                                      |                               |         |         |         |                               |                               |                               |                               |                               |                               |                               |     |        |       |  |  |  |  |
| Additionally Resourced Provision                     | 4,303                                | 147                           | 157     |         |         | 3,553                         | 2,384                         | 750                           | 1,919                         |                               |                               |                               |     |        |       |  |  |  |  |
|  |                                      |                               |         |         |         |                               |                               |                               |                               |                               |                               |                               |     |        |       |  |  |  |  |
| In-Borough Post-16 Top-up                            | 1,284                                |                               |         |         |         | 1,284                         | 1,329                         | 0                             | -45                           |                               |                               |                               |     |        |       |  |  |  |  |
| In-Borough Post-19 Top-up                            | 387                                  |                               |         |         |         | 387                           | 256                           | 0                             | 131                           |                               |                               |                               |     |        |       |  |  |  |  |
| Out of Borough Post-16                               | 1,043                                |                               |         |         |         | 1,043                         | 687                           | 0                             | 356                           |                               |                               |                               |     |        |       |  |  |  |  |
| Expenditure on Post-16 Tuition                       | 112                                  |                               |         |         |         | 112                           | 102                           | 0                             | 10                            |                               |                               |                               |     |        |       |  |  |  |  |
| Internships  | 182                                  |                               |         |         |         | 182                           | 144                           | 0                             | 38                            |                               |                               |                               |     |        |       |  |  |  |  |
| Total Post-16  | 3,008                                |                               |         | 244     | 254     | 3,008                         | 2,518                         | 0                             | 490                           |                               |                               |                               |     |        |       |  |  |  |  |
|  |                                      |                               |         |         |         |                               |                               |                               |                               |                               |                               |                               |     |        |       |  |  |  |  |
| Non-Maintained & Independent Special Schools Pre-16  | 4,186                                | 65                            | 70      |         |         | 3,973                         | 2,829                         | 213                           | 1,357                         |                               |                               |                               |     |        |       |  |  |  |  |
| Non-Maintained & Independent Special Schools Post-16 | 943                                  |                               |         | 12      | 12      | 866                           | 967                           | 77                            | -24                           |                               |                               |                               |     |        |       |  |  |  |  |
|  |                                      |                               |         |         |         |                               |                               |                               |                               |                               |                               |                               |     |        |       |  |  |  |  |
| Early Years EHCPs                                    | 565                                  |                               |         |         |         | 429                           | 149                           | 136                           | 416                           |                               |                               |                               |     |        |       |  |  |  |  |

New Special School in operation since Sep-23, transitional arrangements working to being fully operational

increased numbers and rates of funding

increased numbers

increased numbers and rates of funding

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|                       |
|-----------------------|
| Alternative Provision |
| Central support teams |
| <b>Total</b>          |

|               |       |       |     |     |
|---------------|-------|-------|-----|-----|
| 3,150         |       |       |     |     |
| 2,350         |       |       |     |     |
| <b>60,928</b> | 1,982 | 2,042 | 330 | 353 |

|               |
|---------------|
| 3,150         |
| 2,200         |
| <b>61,836</b> |

|               |
|---------------|
| 2,420         |
| 2,076         |
| <b>46,276</b> |

|             |               |
|-------------|---------------|
| 0           | 730           |
| 150         | 274           |
| <b>-908</b> | <b>14,652</b> |

|                         |
|-------------------------|
| Total funding available |
| Forecast overspend      |

|                |
|----------------|
| <b>25,780</b>  |
| <b>-35,148</b> |

|                |
|----------------|
| <b>25,338</b>  |
| <b>-36,497</b> |

|                |
|----------------|
| <b>30,300</b>  |
| <b>-15,976</b> |

|              |                |
|--------------|----------------|
| <b>442</b>   | <b>-4,520</b>  |
| <b>1,350</b> | <b>-19,172</b> |





**Subject Heading:**

**High Needs Funding**

**Report Author:**

**Hany Moussa – Principal Education  
Finance Officer**

**Eligibility to vote:**

**All members**

### SUMMARY

This report provides a year end forecast of expenditure against the high needs budget for 2024-25, Notional SEN breakdown and the progress from the High Needs Task and Finish group.

### RECOMMENDATIONS

That the Schools Funding Forum:

- (i) notes the year forecast of expenditure for financial year 2024-25
- (ii) notes the thresholds for the EHCP and SEN Support from the Notional SEN budget
- (iii) notes the progress made by the High Needs Task and Finish Group and the requirement for a report to be tabled for Cabinet consideration and approval

## REPORT DETAIL

### 1. High Needs Forecast 2024-25

Appendix A shows the funding available for High Needs related expenditure in 2024-25 and the current forecast of expenditure across the range of provision within Havering.

The forecast for year end 2024-25 has been updated based on the current academic year (2024-25) cohort and with an update on the estimate on the number and level of support funded through EHC plans.

#### Projection

##### Expenditure

|             |  |
|-------------|--|
| £m          |  |
| 60.9        | High Needs estimated expenditure 24-25 |
| <u>60.9</u> |  |

##### Income

|              |                                     |
|--------------|-------------------------------------|
| £m           |                                     |
| -39.9        | High Needs funding allocation 24-25 |
| -1.2         | transfer from schools block         |
| <u>-41.1</u> |                                     |

##### Balances

|             |  |
|-------------|--|
| 19.8        | projected in-year deficit 24-25            |
| 6.8         | deficit brought forward from 23-24         |
| <u>8.5</u>  | deficit brought forward from 22-23         |
| <u>35.1</u> | projected deficit carried forward to 25-26 |

Further details on the projected spend is shown at Appendix A.

In financial year 2023-24, the overspend of £7.6m was offset by £0.76m of underspends in other areas of the Dedicated Schools Budget (DSG). There remains a deficit carried forward into financial year 2024-25 of £19.8m.

This is the fifth year that the combined total of all year end balances of activities funded by the DSG has been in deficit. This is due to DSG underspends in other areas being insufficient to cover the overspend in the High Needs Block.

Any LA that has an overall deficit on its DSG account at the end of the 2023-24 financial year, or whose DSG surplus has substantially reduced during the year, is required to complete the Dedicated School Grant Management Plan or to have an equivalent framework.

The LA will continue to keep all areas of DSG spending under review to identify potential savings to meet the forecast overspend in the High Needs block.

## **2. Notional SEN Funding within Delegated Budgets (APT) for EHCP and SEN Support (K code)**

The notional Special Educational Needs (SEN) budget forms part of the overall funding allocated to mainstream schools through the Authority Proforma Tool (APT). It is designed to help schools meet the needs of pupils with SEN, including those with an Education, Health and Care Plan (EHCP) and those identified under SEN Support (K code).

The DfE expectations for support for EHCP and SEN Support children are as follows:

### **2.1 EHCP Funding**

For pupils with an EHCP, schools are expected to contribute up to £6,000 from their delegated budget for additional support required, before top-up funding is provided by the local authority. This £6,000 threshold is derived from the notional SEN allocation within a school's overall budget, which varies depending on school size, needs profile, and local funding formula.

Presently, the "hours" that the £6,000 represents is 9 hours, however the LA is looking at a change of reporting to support schools to be able to deliver the outcomes of the EHCPs.

Havering has the Inclusion Supplement, which is reviewed annually, and should a school Notional SEN allocation be less than the expected level of funding expected for the number of EHCP children, then additional funding is provided to support the school.

### **2.2 SEN Support (K code)**

For pupils under SEN Support (K code), the notional SEN funding is used to address their needs without the requirement for an EHCP, which on average for 2024-25 is £3,635 per pupil.

Schools are expected to use their delegated notional SEN budget to provide the necessary interventions, resources, or support. This is often managed within the school's overall SEN provision, which may vary based on pupil numbers and levels of need.

The Notional SEN budget is identifiable in the funding statements that schools receive from the LA or ESFA.

## **3. High Needs Task and Finish group**

A task and finish group was re-established in Summer 2024 to examine high needs funding for schools for the present and future financial years, to review the current arrangements for a long term sustainable model of support for those children with additional needs in attendance in educational provisions across the borough.

The group are due to meet after the Forum meeting has concluded.

## **4. High Needs Task and Finish Group Funding Proposals Update**

This section of the report provides an update on the ongoing discussions and proposals related to the High Needs funding for mainstream schools, specialist units, and alternative provision.

There has been productive engagement and positive feedback from the High Needs Task and Finish Group, with several key areas identified for further consideration.

### **4.1 Mainstream Schools Top-Up Funding**

The working group has been reviewing the current £17 per hour top-up rate for mainstream schools, applicable for support hours in excess of 9 hours in an Education, Health and Care Plan (EHCP). The group has proposed amending this rate to better reflect the financial and operational needs of schools. Additionally, there has been positive feedback on the proposal to shift from reporting hours to a banding or monetary system. This will assist schools in implementing more effective interventions and provide clarity, preventing any misinterpretation by parents/guardians that allocated hours strictly represent required Teaching Assistant (TA) support.

### **4.2 Specialist Units Funding**

A standardised approach to funding and structuring specialist units has been agreed in principle by the group. This will ensure greater consistency across schools and better alignment with the needs of pupils with more complex requirements.

The group will also be reviewing:

- The Special School Matrix, to ensure the current structure aligns with the needs of pupils and schools.
- Alternative Provision, with a focus on Social Inclusion and Medical Outreach support, to strengthen the targeted assistance provided to schools and pupils.

### **4.3 Financial Implications**

The Local Authority is currently in a deficit of £15.3m in DSG, with projections indicating that this could rise to £35.1m.

Given these significant financial pressures, any proposals that are recommended for adoption will require approval by the Cabinet through a formal report. It is crucial to ensure that all measures provide targeted support and deliver value for money, reflecting the financial constraints faced by the Local Authority and other councils.

Schools Forum members are asked to note the progress made by the High Needs Task and Finish Group and to support the continued development of these proposals. The final recommendations will be presented for approval,

alongside a Cabinet report, ensuring all proposed changes are carefully reviewed in light of the current financial challenges.

The group are due to meet after the Forum meeting has concluded and will feedback at the next Forum meeting due to be held on 28th November 2024.



## Schools Funding Forum 17th October 2024

## ITEM 8

**Subject Heading:**

**Central Schools Services Block (CSSB)  
2025-26**

**Report Author:**

**Hany Moussa – Principal Education  
Finance Officer**

**Eligibility to vote:**

**All school and academy members**

### SUMMARY

This report summarises the locally projected DSG Central Schools Services Block (CSSB) funding for financial year 2025-26 and seeks approval for the retention of funding to maintain central statutory services.

### RECOMMENDATIONS

That the Schools Funding Forum:

- (i) notes the projected allocation of CSSB for 2025-26
- (ii) considers the request to retain funding for central statutory services

### REPORT DETAIL

#### 1. Background

As part of the introduction of a Schools and High Needs National Funding Formula in 2018-19 the DfE also introduced a fourth funding block, the CSSB, which

brought together funding for services previously funded through the Schools Block and through an Education Services Grant. The projected allocation for 2025-26 is shown below.

The ESFA Operational Guidance requires Schools Forum approval for the central retention of this funding, as shown at section 3 below.

## 2. CSSB allocation 2025-26

Indicative funding for 2025-26 through the DSG Central Service Block has been delayed, and is due to be announced by the DfE after the Autumn Budget statement in late October.

In advance of the announcement, below is the projected allocation with an uplift of 2.0% to the per pupil rate for the CSSB. The table below has comparable data from 2024-25.

|                   | Ongoing responsibilities |             |           | Historical commitments | Total CSSB |
|-------------------|--------------------------|-------------|-----------|------------------------|------------|
|                   | Pupil nos.               | Per pupil £ | £         | £                      | £          |
| 2025-26 projected | 39,645.0                 | 42.50       | 1,684,912 | 75,365                 | 1,760,277  |
| 2024-25 final     | 39,645.0                 | 41.67       | 1,652,383 | 94,206                 | 1,746,589  |
| Difference        | 0                        | 0.83        | 32,529    | -18,841                | 13,688     |

## 3. Services to be funded

The services that LAs can fund from the CSSB are set out in the extract from the Operational Guidance, which we have used the 2024-25 version as the basis for the 2025-26, due to the delay of the release for 2025-26 allocations and guidance. For Havering, these services are as follows:

| Ongoing responsibilities           | Final 2024-25 £  | Projected 2025-26* | Projected change £ | Proposed change % |
|------------------------------------|------------------|--------------------|--------------------|-------------------|
| Copyright licences                 | 230,000          | 234,082            | 4,082              | 1.8               |
| Admissions                         | 555,738          | 566,853            | 11,115             | 2.0               |
| Schools Forum                      | 45,662           | 46,575             | 913                | 2.0               |
| LA responsibilities to all schools | 761,019          | 776,239            | 15,220             | 2.0               |
| Pension funding                    | 59,964           | 61,163             | 1,199              | 2.0               |
| Unallocated                        | 0                | 0                  | 0                  | 0                 |
| <b>Total</b>                       | <b>1,652,383</b> | <b>1,684,912</b>   | <b>32,529</b>      | <b>2.0</b>        |

| Historical commitments                       | Proposed 2024-25 £ | Projected 2025-26 | Proposed change £ | Proposed change % |
|--|--------------------|-------------------|-------------------|-------------------|
| Schools Partnerships/Schools Causing Concern | 94,206             | 75,365            | -18,841           | -20.0             |

|              |                  |                  |               |            |
|--------------|------------------|------------------|---------------|------------|
| <b>Total</b> | <b>1,746,589</b> | <b>1,760,277</b> | <b>13,688</b> | <b>0.8</b> |
|--------------|------------------|------------------|---------------|------------|

### **Ongoing responsibility element**

The copyright licence costs tend to increase each year but LAs are not notified of the increase until later in the year. An estimated sum of £234,082 has been included. Areas relating to salary costs have been increased by 2.0%. The actual increase in cost is likely to be in excess of 5.0%.

### **Historic Commitments element**

Continuing the financial year arrangements for this element of the grant, the LA is proposing that for 2025-26 that this continues to be used for items that are accessible to a large number of schools. This includes the coaching bursary, Havering Academy of Leadership and support commissioned on behalf of all schools.

Schools Funding Forum approval is requested for this use of the CSSB.





## Notice of KEY Executive Decision

|   |   |
|---|---|
| <b>Subject Heading:</b>                   | Review of the proposed increase in the baseline pay rate for external Apprentices   |
| <b>Decision Maker:</b>                    | <b><i>***Redacted to protect personal information and ensure the privacy of individuals in accordance with GDPR requirements.***</i></b>  |
| <b>Cabinet Member:</b>                    | <b><i>***Redacted to protect personal information and ensure the privacy of individuals in accordance with GDPR requirements.***</i></b>  |
| <b>ELT Lead:</b>                          | <b><i>***Redacted to protect personal information and ensure the privacy of individuals in accordance with GDPR requirements.***</i></b>  |
| <b>Report Author and contact details:</b> | <b><i>***Redacted to protect personal information and ensure the privacy of individuals in accordance with GDPR requirements.***</i></b>  |
| <b>Policy context:</b>                    | Pay and Grading Policy  |
| <b>Financial summary:</b>                 | An increase in the 2024/25 financial reporting period of £62,255.98 to uplift the baseline pay rate of all existing external apprentices (this request does not apply to internal staff who are undertaking apprentice training). There are currently 7 external apprentices working at the Council |

## Key Executive Decision

|  |   |
|--|---|
| <b>Reason decision is Key</b>                        | This decision is key as:<br><ul style="list-style-type: none"><li>(a) it supports the early careers of residents from Havering</li><li>(b) increases the quality of apprentice who apply to work with us</li><li>(c) promotes retention of our apprentices post qualification and</li><li>(d) furthers our aspiration of being an employer of choice.</li></ul> |
| <b>Date notice given of intended decision:</b>       | N/A   |
| <b>Relevant Overview &amp; Scrutiny Committee:</b>   | N/A   |
| <b>Is it an urgent decision?</b>                     | Yes, the sooner we are able to establish the increase in apprentice baseline pay to National Minimum Wage the better placed the Council will be in attracting and retaining high quality apprentices into working with us.  |
| <b>Is this decision exempt from being called-in?</b> | This is a non-key decision  |

### **The subject matter of this report deals with the following Council Objectives**

People - Supporting our residents to stay safe and well

Place - A great place to live, work and enjoy X

Resources - Enabling a resident-focused and resilient Council X

## **Part A – Report seeking decision**

### **DETAIL OF THE DECISION REQUESTED AND RECOMMENDED ACTION**

As Havering continues to face challenging times as an organisation and for its residents it is key for us to be able to support our working community through the provision of properly remunerated and well design apprenticeship training. Our current pay rate of £6.40 per hour for all apprentices in their first year with Havering falls well short of the National Minimum Wage (£11.44 per hour from April 2024). As an organisation which aspires to be more inclusive and divers, we have a moral obligation to remunerate our apprentices properly to help stave of their own cost of living issues as well as placing Havering as a desirable place for apprentices to work and stay during the early part of their careers. There are currently 7 existing apprentices who will be affected by this change but will apply to all future external apprentices. Our proposal it to pay National Minimum Wage (NMW) from day 1 of their time with us and align their pay to the annual increase in the NMW baseline pay rate as set by central Government. As indicated above and shown in the chart below (Appendix 1), this would mean an initial increase of £65,255.98 in the financial year 24/25. If approved, this change would come into immediate affect for this group of employees and all future external apprentices thereafter. Benefits of making this change are: it supports the early careers of residents from Havering, increases the quality of apprentice who apply to work with us, promotes retention of our apprentices post qualification and furthers our aspiration of being an employer of choice. Our recommended action is to approve this review and request in relation to Apprentices and NMW.

### **AUTHORITY UNDER WHICH DECISION IS MADE**

***Cite here the authority in the Constitution, or the Cabinet decision, under which the executive decision or key decision is made. Individual Cabinet members' responsibilities for functions are set out in Part 3, section 2.2 of the Constitution.***

### **STATEMENT OF THE REASONS FOR THE DECISION**

To pay external apprentices the national minimum wage form day 1 of their engagement with London Borough of Havering.

### **OTHER OPTIONS CONSIDERED AND REJECTED**

Failure to pay external; apprentices the national minimum wage will limit our ability to attract high quality applicants when neighbouring boroughs already undertake this practice as standard.

### **PRE-DECISION CONSULTATION**

***\*\*\*Redacted to protect personal information and ensure the privacy of individuals in accordance with GDPR requirements.\*\*\****

who are supportive of paying external apprentices national minimum wage.

**Key Executive Decision**

|  |
|--|
|  |
|--|

**NAME AND JOB TITLE OF STAFF MEMBER ADVISING THE DECISION-MAKER**

Name: ***\*\*\*Redacted to protect personal information and ensure the privacy of individuals in accordance with GDPR requirements.\*\*\****

Designation:

Signature: :

Date: 18<sup>th</sup> April 2024

## Part B - Assessment of implications and risks

### LEGAL IMPLICATIONS AND RISKS

N/A

### FINANCIAL IMPLICATIONS AND RISKS

An increase in the 2024/25 financial reporting period of £62,255.98 to uplift the baseline pay rate of all existing external apprentices (this request does not apply to internal staff who are undertaking apprentice training). There are currently 7 external apprentices working at the Council.

### HUMAN RESOURCES IMPLICATIONS AND RISKS (AND ACCOMMODATION IMPLICATIONS WHERE RELEVANT)

The comparison for equal pay has been undertaken and there are no HR implications

### EQUALITIES AND SOCIAL INCLUSION IMPLICATIONS AND RISKS

The Public Sector Equality Duty (PSED) under section 149 of the Equality Act 2010 requires the Council, when exercising its functions, to have 'due regard' to:

- (i) The need to eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010;
- (ii) The need to advance equality of opportunity between persons who share protected characteristics and those who do not, and;
- (iii) Foster good relations between those who have protected characteristics and those who do not.

Note: 'Protected characteristics' are age, sex, race, disability, sexual orientation, marriage and civil partnerships, religion or belief, pregnancy and maternity and gender reassignment.

The Council is committed to all of the above in the provision, procurement and commissioning of its services, and the employment of its workforce. In addition, the Council is also committed to improving the quality of life and wellbeing for all Havering residents in respect of socio-economics and health determinants.

An EqHIA (Equality and Health Impact Assessment) is usually carried out when a proposed or planned activity is likely to affect staff, service users, or other residents.

The Council seeks to ensure equality, inclusion, and dignity for all in all situations.

**Key Executive Decision**

There are no equalities and social inclusion implications and risks associated with this decision.

**HEALTH AND WELLBEING IMPLICATIONS AND RISKS**

By raising the basic rate of pay for external apprentices it will have a positive impact of their ability to cope with the national cost of living crisis.

**ENVIRONMENTAL AND CLIMATE CHANGE IMPLICATIONS AND RISKS**

N/A

**Key Executive Decision**

**BACKGROUND PAPERS**

None

**APPENDICES**

**Appendix 1 – Current Apprentices Pay Data**

***\*\*\*Redacted to protect personal information and ensure the privacy of individuals in accordance with GDPR requirements.\*\*\****

**Key Executive Decision**

**Part C – Record of decision**

I have made this executive decision in accordance with authority delegated to me by the Leader of the Council and in compliance with the requirements of the Constitution.

**Decision**

Proposal agreed

*Delete as applicable*

Proposal NOT agreed because

**Details of decision maker**

Signed

Name:

Cabinet Portfolio held:

CMT Member title:

Head of Service title

Other manager title:

Date:

**Lodging this notice**

The signed decision notice must be delivered to Committee Services, in the Town Hall.

**For use by Committee Administration**

This notice was lodged with me on \_\_\_\_\_

Signed \_\_\_\_\_





**Subject Heading:**

**Scheme of Financing Schools,  
Apprenticeship Uplift, Grants and  
Survey**

**Report Author:**

**Hany Moussa – Principal Education  
Finance Officer**

**Eligibility to vote:**

**Maintained school members**

**SUMMARY**

This report provides details of update to the Scheme of Financing Schools, apprenticeship uplift for maintained schools, educational grants and the Children's Commissioner statutory School Survey.

**RECOMMENDATIONS**

That the Schools Funding Forum:

- (i) notes the grants for UIFSM, GLA UFSM, CSBG, TPECG and TPAG
- (ii) Applicable members to agree the apprenticeship uplift for apprentices in schools

## REPORT DETAIL

### **1. Scheme for Financing Schools**

This Scheme outlines the financial relationship between the London Borough of Havering and the maintained schools it funds. It specifies the financial management and related requirements that are binding on both Havering Local Authority (LA) and the schools.

While the LA holds responsibility for the overall control of public funds, the delegation arrangements grant Governing Boards the authority to manage their budgets and allocate resources to support their school's objectives. The requirements within the Scheme are designed to offer schools sufficient flexibility to exercise their delegated powers while ensuring proper accountability and control over the use of public funds.

We are currently updating the Scheme in line with the latest guidance and recommendations from the Department for Education (DfE). Although there are no significant changes, the updated document will be presented at the Schools Forum in the meeting scheduled for November, following discussions with school governing bodies.

School Forum members are to note the update to the Scheme for Financing Schools.

### **2. Universal Infant Free School Meals (UIFSM) funding for academic year 2023/24 and 2024/25**

The final allocations for academic year 2023/24 and the indicative funding rate for academic year 2024/25 for UIFSM is yet to be confirmed, which is expected to be announced following the Autumn Budget Statement in late October. We anticipate that the conditions and principles of funding will remain the same as per previous allocations and guidance.

The funding rate for academic year 2023/234 is anticipated to remain unchanged at £2.53 which is the equivalent of the national pre-ACA NFF rate for the FSM factor for 2023-24 of £480 per FSM pupil (190 days x £2.53). For academic year, we anticipate that the rate for UIFSM to be £2.58, which is the equivalent of the national pre-ACA NFF rate for the FSM factor for 2024-25 of £490 per FSM pupil.

To maximise your UIFSM funding, we recommend encouraging Key Stage 1 children to take a meal on census days. Schools are encouraged to continue working with the Catering suppliers, at organising themed meals or a prize draw for those who book a meal on these days. Not only will this strategy help increase your funding, but it may also encourage greater long-term meal uptake among pupils who typically bring packed lunches.

School Forum members are to note this update.

### **3. GLA Universal Free School Meals (UFSM) - Primary**

The Mayor's Universal Free School Meals (UFSM) Programme is providing £140 million in funding to continue offering free meals to all Key Stage 2 (KS2) children in London's state-funded primary schools during the 2024-25 academic year. This funding is aimed at alleviating the cost-of-living pressures on families and ensuring that no child in London goes hungry at school. The rate per meal has increased from £2.65 to £3.00 per meal for academic year 2024-25.

Main points for School Forum to be aware of:

- Funding of £5,499,873 has been allocated to Havering to support this initiative.
- Funding will be delivered in stages: 50% in August 2024, 25% in December 2024, and the remaining 25% in April 2025.
- Schools are expected to collect and report data on meals taken by KS2 children on census days to ensure accurate funding distribution, which is anticipated to be during the Spring and Summer terms.
- Additional funding may be provided if schools experience an uptake of over 90%, subject to application and data assurance checks.
- The funding must be used to cover the cost of food, and any surplus can be used to support the UFSM programme or related challenges.

The GLA will provide monitoring and evaluation to ensure the programme's effectiveness and compliance with its objectives.

School Forum members to note this update.

### **4. Core Schools Budget Grant (CSBG) Methodology 2024 to 2025**

The DfE is providing additional funding for schools through the Core Schools Budget Grant (CSBG) for the period from September 2024 to March 2025. The CSBG is designed to support schools with the costs related to teacher pay awards and broader school cost pressures.

This grant is applicable all state-funded primary, secondary, and special schools, as well as pupil referral units and maintained nursery schools, will be eligible for the grant. Independent schools are not eligible.

Allocations are based on a base per-pupil amount, with an additional weighting applied for pupils with special educational needs (SEN). Small schools will also receive a lump sum to ensure fair allocation.

The CSBG will be paid in two instalments during the 2024-25 financial year. Local authorities will distribute the funds directly to maintained schools, while academies will receive payments via the Education and Skills Funding Agency (ESFA).

The funding is intended to support schools in meeting their operational costs, including staff salaries, support services, and other essential functions to maintain standards of education.

This grant will help mitigate rising operational costs and ensure schools can continue to deliver high-quality education while managing financial pressures.

School Forum members to note this update.

## **5. Teachers' Pension Employer Contribution Grant (TPECG) 2024 to 2025**

The Teachers' Pension Employer Contribution Grant (TPECG) continues to provide financial support to schools and high-needs settings for the additional costs related to increased employer pension contributions.

The TPECG supports schools with the costs of increased employer pension contributions from September 2024 to March 2025, following changes in the rate of employer contributions to the Teachers' Pension Scheme.

Allocations are based on pupil numbers from the October 2023 census. Special schools and alternative provision settings receive additional funding to reflect the higher costs of supporting pupils with special educational needs.

Payments will be made in two instalments for the 2024-25 financial year.

The first payment covers the period from September 2024 to March 2025.

This grant will help schools manage the increased pension costs without impacting their budgets, ensuring that schools can continue to maintain their staffing levels and educational standards.

School Forum members to note this update.

## **6. Teachers Pay Additional Grant (TPAG) 2024-2025**

The Teachers Pay Additional Grant (TPAG) is designed to provide additional funding to local authorities and schools to support teacher salaries, following the government's commitment to increase pay rates for teachers in England.

The TPAG aims to assist schools in implementing the pay increases announced for teachers and headteachers, ensuring that schools can attract and retain high-quality teaching staff.

The grant is distributed based on a formula that considers the number of eligible teachers in schools, and Local authority characteristics and historical funding patterns.

Local authorities will receive the TPAG funding in two instalments:

- The first instalment will be paid in November 2024.
- The second instalment is scheduled for February 2025.

All maintained schools, academies, and free schools in England that employ teachers are eligible to receive the grant. Funding is specifically intended to cover the additional costs incurred due to the pay increases.

School Forum members to note this update.

## 7. Apprenticeship Rate Uplift – Maintained Schools

A recent proposal from the Council's Internal HR (Appendix A) was approved to increase the apprenticeship pay rate retroactively to April 2024, specifically for council-employed staff. This uplift was implemented in July 2024, backdated to cover the period from April onwards. However, it was noted that the initial paper did not include school-based apprentices, and no formal consultation with schools occurred.

Schools HR, alongside the Internal HR, recognised that this uplift should also apply to apprentices in maintained schools, as they are employed under the same pay and conditions as council staff. Not applying the uplift to school apprentices may present an equal pay risk for Havering, as it creates a disparity between council-employed apprentices and those in maintained schools.

The current pay rates for apprentices following government guidance is as follows:

| Pay Rates | Under 18 | 18 to 20 | 21 and over |
|-----------|----------|----------|-------------|
| Year 1    | £6.40    | £6.40    | £6.40       |
| Year 2    | £6.40    | £8.60    | £11.44      |

The new rates for apprentices employed by Havering is as follows:

| Pay Rates | Under 18 | 18 to 20 | 21 and over |
|-----------|----------|----------|-------------|
| Year 1    | £11.44   | £11.44   | £11.44      |
| Year 2    | £11.44   | £11.44   | £11.44      |

The total cost for an apprentice working 36 hours per week over 44.8 weeks (reflecting the academic calendar) during the year with the apprentice opting out of the pension, is as follows:

| Age Start | Age Finish | Previous |         |                | New     |         |                | Additional Cost |
|-----------|------------|----------|---------|----------------|---------|---------|----------------|-----------------|
|           |            | Yr1      | Yr2     | Total          | Yr1     | Yr2     | Total          |                 |
| 16        | 18         | £10,491  | £10,491 | <b>£20,981</b> | £19,741 | £19,741 | <b>£39,482</b> | £18,500         |
| 17        | 19         | £10,491  | £14,528 | <b>£25,019</b> | £19,741 | £19,741 | <b>£39,482</b> | £14,463         |
| 18        | 20         | £10,491  | £14,528 | <b>£25,019</b> | £19,741 | £19,741 | <b>£39,482</b> | £14,463         |
| 19        | 21         | £10,491  | £14,528 | <b>£25,019</b> | £19,741 | £19,741 | <b>£39,482</b> | £14,463         |
| 20        | 22         | £10,491  | £19,741 | <b>£30,231</b> | £19,741 | £19,741 | <b>£39,482</b> | £9,250          |
| 21        | 23         | £10,491  | £19,741 | <b>£30,231</b> | £19,741 | £19,741 | <b>£39,482</b> | £9,250          |

There are five schools affected, with six out of the existing eight apprentices affected. The table below outlines the impact of the proposal to schools and the additional cost for a full year will be £38,341.

| Status           | Pay       | NI       | Total     | Count |
|------------------|-----------|----------|-----------|-------|
| Infant School 1  | 13,549.86 | 1,732.32 | 15,282.18 | 2     |
| Primary School 1 | 5,670.61  | 782.54   | 6,453.15  | 1     |
| Primary School 2 | 3,724.38  | 513.96   | 4,238.35  | 1     |

|                  |                  |                 |                  |          |
|------------------|------------------|-----------------|------------------|----------|
| Infant School 2  | 4,345.11         | 599.63          | 4,944.74         | 1        |
| Primary School 3 | 6,608.58         | 814.06          | 7,422.64         | 1        |
|                  | <b>33,898.54</b> | <b>4,442.52</b> | <b>38,341.06</b> | <b>6</b> |

While the intention of the uplift was to support apprentices with rising costs, we are seeking Schools Forum members' views and consent on applying the uplift to maintained school apprentices. This will ensure the appropriate governance is followed and that schools agree with the proposed changes.

## 8. Children's Commissioner School Survey

The Children's Commissioner has launched the largest ever survey of schools and colleges in England. This initiative aims to collect extensive data from both students and educational institutions to understand current challenges and the experiences of children across the country. The survey will provide key insights into how schools are meeting the needs of children, particularly in areas such as safeguarding, mental health support, and access to services.

Key Points for Schools Forum:

- Local Authorities (LAs) play a critical role in supporting schools directly or indirectly, making this survey relevant for both LA and school representatives.
- The survey results will help shape national policy and provide evidence to inform future funding allocations, strategic planning, and targeted interventions for children's services.
- Schools and LAs are encouraged to engage actively with the survey to ensure that their experiences and challenges are reflected in the final report.

Schools Forum members should ensure their schools and colleges participate in the survey, contributing valuable data on the challenges faced by students and schools.

This is an important opportunity for both schools and LAs to have their voices heard in shaping future education and child welfare policies.