



SCHOOLS FUNDING FORUM AGENDA

8.00 am

**Thursday
23 October 2025**

**ROOM 233, CEME,
Rainham**

Members 21: Quorum: 9

MEMBERSHIP:

Representative Groups

LA Maintained School Representatives:

Head Teachers (7): Emma Allen, Special
Michael Ross, Primary
Kirsten Cooper, Primary
Georgina Delmonte, Primary
Hayley McClenaghan, Primary
David Unwin-Bailey, Primary
Chris Speller, Primary

Governors (1): Vacancy

**Academy
Representatives:**

Primary (2): Chris Hobson
Vacancy

Secondary (5) Neil Frost
Scott McGuinness
David Turrell
Paul Larnar
Vacancy

Special (1) Andy Smith

AP Academy (1) Tony Machin

**Non-School
Representatives:** **Error! No document variable supplied.**

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

Post 16 (1) Paul Lerner

Diocesan Board (2) Chris Speller, Diocese of Chelmsford
Michael Ross, Diocese of Brentwood

Trade Unions (2): George Blake/John McGill, Teachers
Peter Liddle, Support Staff

**For information about the meeting please contact:
Katherine Heffernan
Katherine.Heffernan@haverling.gov.uk**

AGENDA ITEMS

- 1 APOLOGIES FOR ABSENCE AND ANNOUNCEMENT OF SUBSTITUTE MEMBERS OR OBSERVERS**
- 2 AGENDA 251023 OPEN** (Pages 1 - 2)
- 3 TO AGREE THE NOTES OF THE MEETING HELD ON...**
- 4 HAVERING SFF DRAFT OPEN MINUTES 120625** (Pages 3 - 11)
- 5 MATTERS ARISING**
- 6 MATTERS ARISING ITEM 5 - 8** (Pages 12 - 32)
- 7 NEXT MEETINGS**

The next meetings have been arranged as follows:

27th November 2025 (room 233)
15th January 2026 (room 233)
12th February 2026 (room 235 / remote)
11th June 2026 (room 233)

All meetings to be held at CEME at 8.00am.

- 8 ANY OTHER BUSINESS**

Zena Smith
Democratic and Election Services Manager



HAVERING SCHOOLS FUNDING FORUM AGENDA

8.00 am – 10.00am

23rd October 2025

CEME room 233

Members: 18 (24) Quorum: 7

MEMBERSHIP:

LA Maintained School Representatives			
Primary		Special	
Head Teachers		Head Teacher	
Kirsten Cooper (Cluster D) Georgina Delmonte (Cluster F) Hayley McClenaghan (Cluster C) David Unwin-Bailey (Cluster A) Michael Ross (Cluster B)* Chris Speller (Cluster E)**		Emma Allen	
Governor representative			
Les James			
Academy Representatives			
Primary	Secondary	Special	AP Academy
Chris Hobson Vacancy	Neil Frost Scott McGuinness David Turrell*** Paul Larner*** Vacancy	Andy Smith	Tony Machin
Non School Representatives			
Early Years (PVI Sector)	Post 16	Diocesan Board	Trade Unions
Emma Reynolds	David Turrell / Paul Larner***	Diocese of Brentwood - Michael Ross* Diocese of Chelmsford - Chris Speller**	Teachers – George Blake or John McGill Support Staff – Julia Newman

* Mike Ross also represents the Diocese of Brentwood

** Chris Speller also represent the Diocese of Chelmsford

*** Paul Larner and David Turrell also represent the Post 16 sector.

Please contact Kavan Cheema kavan.cheema@haverling.gov.uk or Hany Moussa hany.moussa@haverling.gov.uk to give apologies for absence or to raise queries on the agenda.

If you are unable to attend please contact your named substitute or you can request that we do so on your behalf.

AGENDA ITEMS

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

2. ELECTION OF CHAIR AND VICE CHAIR

To elect a Chair and Vice Chair until the first meeting of the autumn term 2025.

3. TO AGREE THE NOTES OF THE MEETING HELD ON 12TH JUNE 2025

To agree the notes of the meeting held on 12th June 2025 as a correct and accurate record.

4. MATTERS ARISING

5. SCHOOLS BLOCK FUNDING

6. HIGH NEEDS FUNDING

7. CENTRAL SCHOOLS SERVICES BLOCK (CSSB)

8. EARLY YEARS FUNDING UPDATE

9. SCHOOLS MONITORING

10. NEXT MEETINGS

Future meetings have been arranged as follows:

27th November 2025 (room 233)
15th January 2026 (room 233)
12th February 2026 (room 235 / remote)
11th June 2026 (room 233)

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

11. ANY OTHER BUSINESS

MINUTES OF A MEETING OF THE HAVERING SCHOOLS FUNDING FORUM

Thursday 12th June 2025 at CEME
(8.00am – 9.55am)

Present:

Representative Groups

LA Maintained School Representatives:

Primary: Kirsten Cooper (Chair)
Georgina Delmonte
Hayley McClenaghan
Mike Ross*
Chris Speller*
David Unwin Bailey

*Mike Ross also representing the Diocese of Brentwood

*Chris Speller also representing the Diocese of Chelmsford

Academy Representatives:

Secondary Neil Frost
Scott McGuiness
David Turrell (Vice Chair) (also representing Post 16)

Special Schools Emma Allen (Maintained)
Vicky Mummery

Non-School Representatives:

Early Years PVI Sector: Becky McGowan

Trade Unions: George Blake (Teaching staff union representative)
Julia Newman (Support staff union representative)

Governor: Les James

Non Members in attendance:

Marcus Bennett**	Head of SEND
Kavan Cheema	Strategic Business Partner
Trevor Cook (TC)	Assistant Director of Education
Katherine Heffernan (KH)	Head of Finance (Business Partnering)
Michelle Morgan	Clerk, HGS
Hany Moussa (HM)	Principal Education Finance Officer

**for part of the meeting

ANNOUNCEMENT OF NEW MEMBERS, APOLOGIES FOR ABSENCE AND ANNOUNCEMENT OF SUBSTITUTE MEMBERS OR OBSERVERS

All were welcomed to the meeting.

Apologies were received from the following Forum Members:

Emma Reynolds – Early Years PVI sector (Becky McGowan in attendance as representative)

Andy Smith – Special Schools Academy sector (Vicky Mummery in attendance as representative)

Chris Hobson – Primary Academy Sector

Tony Machin – AP Primary sector

Jacqueline Treacy – HSIS Senior Inspector

It was questioned whether Paul Lerner was aware that he was a Forum member. HM would check his contact details held were correct.

ACTION: Hany Moussa

Forum Members were asked to seek volunteers from the primary academy and secondary sectors for the remaining vacancies.

It was agreed to appoint Les James, Chair of The Growing Together Federation as Governor Representative.

1. TO AGREE THE MINUTES OF THE MEETING HELD ON 13th FEBRUARY 2025

The minutes of the meeting held on 13th February 2025 were received and agreed.

2. MATTERS ARISING

The following were matters arising from the previous minutes that were not included elsewhere on the agenda:

2.1. Forum composition (minute 4 refers): Forum members were appointed as agreed.

2.2. Early Years Quality Assurance (Minute 4, refers): TC advised that a working party had previously been in place. A discussion was held at the Early Years Provider Reference Group (EYPRG), where clarification had been provided and shared with the sector.

2.3. High Needs Task and Finish group (Minute 6, refers): KH advised that the High Needs Task and Finish Group had not met, however a meeting was scheduled immediately following the Funding Forum. It was agreed that the name should be amended to High Needs Working Group until the deficit position had been resolved.

3. DEDICATED SCHOOLS GRANT – YEAR END BALANCE 2024-25

The report set out the year end position on expenditure from the Dedicated Schools Grant in 2024-25 and the proposed use of balances in 2025-26.

Forum members were asked to:

- **Note the areas of under or overspend from the 2024-25 Dedicated Schools Grant**
- **Agree the allocation of funding in financial year 2025-26 as set out in the proposals included in the report**

It was noted that only maintained school Forum Members could vote on the de-delegated aspect of the report.

HM summarised that the carry forward balance from centrally retained DSG (Dedicated Schools Grant) from 2024-25 into 2025-26 was a deficit of £34.722m. The revised deficit, after commitments have been taken into consideration, at the end of 2023-24 was £15.322m, so the in-year increase was £19.4m.

It was noted that during the financial year 2024-25, the revised forecasted return had been estimated to be up to £36.3m. The reason for the deviation was due to the prudent approach taken due to Early Years (EY) entitlement expansion funding calculations which had led to a £1.7m underspend.

HM went on to explain the proposals:

Early Years Block

- **£1.3m to allocate to providers as a one off enhancement of the base rate in 25/26 based on the summer term census data.**
- **£221K to be retained for SENIF (Special Educational Needs Inclusion Funding) fund for 2025-26 financial year to have means to support any additional demand.**
- **£154K to be retained for the 2025-26 financial year as the DfE had published new guidance stating that Local Authority (LA) would now have to submit census claims 3 times per year so there would be potential infrastructure changes required in order to meet the additional demand.**

A Forum Member questioned the £154K for central team staff and sought further clarity on what additional infrastructure would be needed. HM explained that the EY admissions team might need to add additional capacity to their team and there may also be additional software costs as the current provider had a monopoly in the sector. Other options were being explored, however the provider had a strong hold of the market.

TC advised that what was presented was the indicative budget and not the actual spend. It was hoped therefore that not all the funds would be required.

Forum members voted and unanimously agreed to the proposals.

Schools Block

- **£220K to be retained for Growth to support start-up costs for the new Special School – Balgores.**

TC advised that start-up costs of such a large special school were sizeable and the LA had benchmarked with other similar projects within the London boroughs. Costs would however be staggered over the period between now and the opening of the school which was scheduled for September 2027.

Forum members voted and unanimously agreed to the proposal.

Central Schools Block

- **£1K to be allocated to School Partnerships/SCC.**

Forum members voted and unanimously agreed to the proposal.

De-delegation

- **Carry forward £46K for the re-organisation of arrangements for TUFT (Trade Union Facility Time) as part of the COSWP (Conditions of Service Working Party). This figure was composed of the cumulative balance from the previous year (£26K), in year de-delegation (£2K) and academy buyback (£18K).**

GB summarised for Forum Members the work of the district officers and stressed that their role was not to work at odds with education colleagues but to support with HR procedures and where possible de-escalate situations to avoid more formal (and more costly financially and time) processes and procedures. GS reported that there were currently 3 district NEU officers, all of whom had high caseloads. If the district officers did not have the time to resolve the issue, these would be referred to the regional officer which would delay the process which was not ideal for either the employee, or the school.

The Chair reiterated that as de-delegated funds, this was for maintained schools only and that academies had to make their own TUFT arrangements. GB responded that he would also like to see more academies contributing to trade union time. Funding Forum members therefore sought clarification that some of the TUFT from de-delegated funds was being used to support employees of academies. GB responded that although maintained schools were prioritised, academy employees were also supported.

Funding Forum members shared concerns as they had been unaware that facility time that maintained schools were funding, was also being used for the academy sector where, for some, no financial contribution had been made for this support. Maintained schools should not be subsidising academies.

TC stated that this was an ongoing discussion with the COSWP group. The LA had been clear that all unions should not support colleagues who were not contributing to facility time. The group was looking at whether funds could be allocated based on members, however finalised numbers were awaited from one

of the unions. If unions choose to work under alternative arrangements then the unions should invoice these schools directly.

In response, the Chair explained that this also raised the question why all schools could not use an invoice system, as this could be a cost saving; it was not acceptable to bill one group of schools, and not the other.

An Academy representative stated that 2 years previously, discussions had been held about having more clarity around TUFT and the support that unions members received; more details had been requested by the NEU, however this information had not been shared. It was added, that the experience of Trade Union reps had been working against the school hence the reluctance from some to pay into this system. GB responded that he understood this impression, during hearings the reps were there to support the employee, however reiterated that there was work going on in the background about trying to resolve and deescalate issues early. If there were no district officers, the regional support could take much longer. JN supported and explained that the role at times was to act as a mediator between the school and the employee, with this there would be an increase in formal proceedings.

The Chair thanked GB and JN for their input especially for the transparency from GB which was appreciated. Forum members also stated that their concern was not with the quality of the union representation, just the funding element and, for this meeting, the focus had to be financial.

Referring to the proposal, KH explained that the loss against EAL and Attendance and Behaviour, had been largely offset by Maternity and Insurance.

Forum Members (Maintained schools only) voted and agreed to the proposal.

With regards to the element around TUFT, Forum Members were not willing to agree without consulting with the respective clusters. The VCH questioned, if not agreed, would the maintained schools be compromising their schools. KH gave reassurance that the delegation for this year had already been agreed. TC suggested that the proposal was agreed in principal, however was subject to cluster feedback and an update at the next meeting on the potential allocation model of funding; a final decision would therefore be made in October 2025.

Forum Members (Maintained schools only) agreed to the proposal for the carry forward as long as it was based on a further discussion/decision in the autumn term.

ACTION: Katherine Heffernan / Trevor Cook

High Needs Block

- **The High Needs Block was £36.730m in deficit, with an in year overspend of £21.4m. Some of this was due to the burden of covering out of borough funding for non-Havering resident pupils. This had added an extra £400K to the deficit.**

Forum members reflected that the in-year deficit had accelerated year on year.

Forum members noted the deficit of £36.730m that had been carried forward from 2024-25.

4. EXEMPT FROM PUBLICATION

5. LA MAINTAINED SCHOOLS' BALANCES 2024-25

The report provided an analysis of the LA maintained school balances carried forward from 2024-25 into 2025-26.

Forum members were advised that the net balance was now in a negative for the first time; the deficit outweighed the contingencies. KH explained that the schools who were already in deficit at the end of financial year 2023-24 had increased their deficit, however those in surplus, had remained in a similar position. KH shared her concern regarding the deficit, especially as there had been an injection into the high needs funding rate over 2024-25.

KH acknowledged that the financial situation was causing a number of schools a number of difficulties and stress, however advised that the LA was now in the position where it had to take a more rigorous stance. From this year, as part of the budget setting process, schools in deficit would need to provide an in year deficit recovery plan. KH reiterated that it was not the expectation that schools would be able to clear their deficits over one financial year; that was not a viable scenario, however in year deficits had to stop increasing. Forum members were advised that the current financial state contravened DfE and LA regulations. The finance team had received the 3 year budgets and would be having discussions with any school whose budget was not showing a recovery position within this period.

KH stressed that the LA had listened to feedback from Headteachers hence the increase in High Needs funding and the changes made to the falling rolls funding. There were some schools with a healthy surplus and although the LA was not looking to 'claw back' surplus, consideration would be given when looking at falling rolls or other additional funding as to whether it was required.

As previously suggested, KH proposed establishing a working group to look at school balances to identify common themes and to work together to resolve issues. HM added that the aim of the group would be for peer support and to encourage good practice.

The Chair noted the seriousness of the deficit, however also acknowledged that for schools in deficit, the situation was highly stressful and that no one was spending money inappropriately. If the LA wanted to establish this group, then the Terms of Reference would need to be very clear and suggestions would need to be in the school's gift to deliver upon. For example, advising schools to get their funding for EHCPs quicker, was not within their control. The Chair reminded colleagues that even schools with a surplus had to be mindful, that this could be wiped away very quickly.

A Forum Member suggested that there needed to be more efficient joined up working and gave an anonymised example of a school with a healthy surplus,

receiving SEND capital funding where this could have been used to support another school to improve their provision.

It was requested for Forum Members to have more information to provide an informed narrative; the 9 schools who had been in deficit for over 5 years were of greatest concern and therefore what were the reasons for their deficits so that it would be clear in terms of the focus areas. KH advised that such stratification was available internally.

A Forum Member asked how many of the schools with deficits had high SEN pupil numbers. In response, it was suggested that this would be difficult to ascertain as schools with high numbers of SEN pupils all managed them differently; some schools had had to make painful choices in order to avoid a deficit position.

Referring to the proposed working group, the idea was given that the group should also include those schools on the cusp of a deficit, as a preventative measure. KH agreed and explained that she was also looking at those schools who although had a surplus, had shown in year deficits and therefore would likely soon be in a deficit position.

KH was asked about the approval of the deficit recovery plans; feedback from one of the clusters had been that very similar plans had been submitted as Headteachers had worked together, however only one had been approved, which could breed negativity between schools. KH clarified that only plans which showed recovery back into a balanced budget, were approved. KH added that Headteachers should have been informed. KH explained that clearer communication would be a focus for the team moving forward.

A Forum member shared their experience about being in significant deficit; this had been as a result of being asked to lead a federation which included one failing school. Due to low pupil numbers, the budget deficit had grown and therefore, although the school was now thriving and at PAN, it was incredibly hard to claw back that historical deficit even when in year saving of £300K had been made.

The recommendation was given by a Forum Member that part of the remit of the working group was to support schools to be more accurate in their budget setting.

Information was sought about how other LA's managed school deficits. Feedback was given that there was a different, more robust approach in Essex where schools in deficit had their financial delegated powers removed. KH responded that such an action would not be viable for the number of schools currently in deficit, however agreed that some schools may have to be targeted but it would have to be for the right reasons.

Forum members agreed that schools were carrying the burden as a result of a number of services being stretched; Headteachers and school staff had multi-faceted roles that included health, social care and safeguarding in addition to teaching and learning.

Forum members noted the report and the idea of establishing a working party subject to clear TOR.

6. SECTION 151 BUDGET SUBMISSION 2025-26

The report presented the Section 251 budget statement for the financial year 2025-26.

Forum members were advised, that LAs were required under Section 251 of the Apprenticeships, Skills, Children and Learning Act 2009 to prepare and submit an education and children and young people's services budget statement to the Department for Education by 30th April each year.

HM advised that the projected deficit for 2025-26 for the DSG was £63,201,274 was an increase from £34.7m from 2024-25.

Forum members noted the Section 151 budget statements.

Marcus Bennett arrived at 9.35am

7. EARLY YEARS FUNDING UPDATE

The report outlined the proposed changes in the entitlement to funded Early Years provision, the Early Years Expansion Grant and the DfE change to the LA data collection for the Early Years Block funding from 2026-27

KH reported that the proposed changes had already been shared with the EYPRG. The report provided further details regarding the expansion of the EY provision along with the timeline alongside an explanation regarding the funding rates in place and the EY grant expansion.

Forum members noted the report.

8. HIGH NEEDS FUNDING RATES 2025-26

The report detailed the High Needs funding arrangements and rates for schools for 2025-26 and High Needs Task and Finish group.

KH summarised that approval had eventually been received to move the 2024-25 top up funding for mainstream schools to £19 per hour, which would increase to £20 per hour for 2025-26. KH advised that the rate covered additional NIC costs and some of the provision. It was highlighted that £20 per hour was very generous in comparison with some other boroughs.

Although the current method was to use an hourly rate, there had been a lot of discussion in the High Need Working Group about moving away from this approach to banding. The report showed the initial mapping proposal which illustrated how the current rates would move across into bands.

KH reported that the team had been working with a neighbouring borough which paid a much lower rate of top up funding. Up to 2024-245 the LA had

made the payment to schools, and then recovered the funding from the relevant borough. However, there had not been a great deal of success getting this money back. Discussion had also been held about the rate they used which, as described, was lower; in addition a smaller number of hours were funded across just 3 bands. Where payments had been made and not received, this had led to a shortfall which had contributed to the High Needs deficit by £400K. For 2024-25 schools have not received this funding and KH recognised that it was not a satisfactory situation.

It was questioned if this issue related to a large number of pupils and although the exact number was not known off hand, it was estimated to be between 30-60 pupils. KH explained that in the neighbouring borough, schools had to invoice Havering directly to get the funding. It was noted that the team would engage with the legal team if required. TC added that there were a lot of similar conversations going on about other cross borough services due to the ambiguity in DfE guidance and different interpretations.

Forum members noted the report.

- **To agree 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.**

Forum members agreed.

9. SCHOOL FUNDING FORUM MEETINGS ACADEMIC YEAR 2025-26

The report proposed dates for the meetings of the Schools Funding Forum for the academic year 2025-26 and invited members to discuss meeting arrangements.

Forum members:

- **That Schools Funding Forum agrees the dates and times for meetings in the 2025-26 academic year.**

Thursday 2nd October 2025
Thursday 23rd October 2025
Thursday 27th November 2025
Thursday 15 February 2026
Thursday 12 February 2026
Thursday 11th June 2026

Dates were agreed.

10. ANY OTHER BUSINESS

There were no additional business items.

The Chair thanked Forum members for their engagement and contributions.

Meeting closed at 9.55am.

Forum De-delegation: English as an Additional Language service

Rationale – de-delegation request at a significantly reduced rate

- The purpose of the continuing de-delegation request is to maintain a central team that might otherwise cease to be viable if relying on a traded-only option.
- The proposal factors in reductions in costs to LA-maintained primary schools of at least 39% to reflect schools' varying needs in this area.
- The new Ofsted framework places a focus on children that face 'barriers to their learning', identifying EAL as a vulnerable group with specific inspection criteria outlined.

The proposal

- The LA is proposing that, for the financial year 2026-27, the cost de-delegated per pupil be reduced by 39.2% to £23.12 per EAL pupil. This would provide funding of £71,428.03 towards the costs of the central EAL team (compared to £114,538.00 for the year 2025-26).
- It is anticipated that EAL3 factor funding for schools will increase over the year due to changing demographics. The amount retained by the LA will be capped at £72,000, leaving more in school budgets throughout the course of the year.

Access to the service, 2024-25

- In the 2024-25 financial year, the EAL team were (and continue to be) active in providing support to two-thirds of all mainstream Havering primary and secondary schools/academies through a combination of the traded service and de-delegation.
- 90% of LA-maintained primary schools accessed the service via the HES portal, of whom delegates from 77% of schools booked onto centrally-held EAL training and 60% requested and received consultancy support.
- The team provided (and continue to provide) ongoing email and telephone support and advice to LA-maintained primaries with many resources – including those relating to on-entry assessment, monitoring of proficiency in English, SEND/EAL assessments, and teaching resources – shared by email and through the EAL resources area within the HES portal.

EAL services available for LA-maintained primaries

- EAL QA visits, e.g. to prepare for the new inspection framework
- Pupil-focused visits, e.g. for children new to English and/or EAL/SEND observations
- Consultancy visits, e.g. around the role of EAL co-ordinator or EAL TA
- EAL CPD, e.g. staff meetings and specialist training for groups of staff
- EAL learning walks
- Teacher surgeries, e.g. to discuss the best provision for priority learners
- Twice-termly networks for EAL co-ordinators and EAL TAs
- Unlimited access to centrally-held EAL CPD
- Telephone and email support
- Access to the subscriber-only content on the HES EAL resources pages: <https://www.hes.org.uk/Page/147>
- Regular email updates including information around the Homes for Ukraine tuition programme, ESOL for parents via the Adult College, support available via HavASR, and external provision such as free Bell Foundation webinars.

Effectiveness of the support

- In the 2024-5 HES customer satisfaction survey, 100% of respondents rated the quality of the service as good or better.
- Comments from respondents include 'Excellent support' and 'Very helpful service and great advice to assist with our changing demographics'.

Trade Union Facility Time (TUFT)

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 - Havering Education Quality Assurance Process 2025-2026

Quality Assurance Cycle

A key objective of the Local Authority (LA) is that all children will attend a school that is judged to be “effective” by Ofsted.

To support the maintenance of high standards, all LA maintained schools will be included in the LA Quality Assurance (QA) cycle. Schools in Federations have individual URNs and will therefore be deemed to be separate schools for purposes of the QA cycle.

Schools which are stand-alone academies, or schools that are part of an academy trust are welcome to participate in all aspects of the cycle in the same way as maintained schools. However they are not required to participate in the way that LA schools are, and if they choose to participate then there will be a charge from April 2026.

However, as a minimum, schools that are an academy will be strongly encouraged to participate in Keeping in Touch (KIT) visits. The KIT visits may focus, by negotiation on individual member schools within the cycle window, and an overview of the trust schools within Havering and trust quality assurance processes generally. The KIT will ensure that the LA has the necessary information to ensure that elected members are kept fully engaged in the local education system. We also encourage the sharing of good practice between all providers in our education community regardless of governance arrangements.

The LA proposes the following cycle of QA for “effective” schools:

Timeline

Year 1 – Post Ofsted Inspection leaders attending to ‘Areas for Improvement’

Year 2 - KIT visit or Peer Review Programme, if eligible

Year 3 - Full QA (Ofsted Readiness) visit

Year 4 - KIT visit

Year 5 - Ofsted Inspection (Courtesy call) (possible KIT)

A school will join a point of the LA QA cycle according to when it was last inspected by Ofsted. This will be done by term as near as possible.

KIT Visits

A school judged to be “effective” will have a Keeping in Touch (KIT) visit 12 months after inspection.

A KIT visit of up to half a day, will include a discussion about:

- o the strengths of the school and evidence to support
- o area of improvement/focus, improvement planning, impact of actions taken and evidence to support this
- o pupil outcomes
- o concerns the school or the LA may have
- o brokerage of support

If a KIT visit suggests that one or more areas of the school's practice appears vulnerable, the school is strongly encouraged to engage with a specialist advisor to undertake a more in depth analysis of that area of practice in order to address any area of vulnerability.

If prior to September 2024 a school was graded Requires Improvement following a Graded Inspection or the evidence gathered during an Ungraded Inspection suggested that the grade may be lower than Good if a Graded Inspection was to be carried out, or post September 2024 a school is judged not to be "effective", then the school will be subject to 'Requiring Additional Intervention & Support' by the LA in the case of maintained schools. In academies, the LA will offer additional support and encourage engagement with the plans for improvement, or if necessary engage with the DfE Regional Director. Support from the LA would be chargeable.

Where serious concern is identified the DfE will continue to intervene, including by issuing an academy order. From September 2024 the policy of government intervention for two or more consecutive judgements of "requires improvement" will be one of providing support.

In year 2 of the cycle, following inspection, schools not subject to 'Requiring Additional Intervention & Support' are encouraged to be involved in school-to-school improvement programmes, e.g. facilitated peer review, peer support and HSIS school improvement packages. Where an LA officer is a participant in the facilitated peer review, in some circumstances where the focus is suitable, this may replace the KIT visit.

It is envisaged that these programmes will support leaders to address the areas for improvement noted in the inspection report and others that are identified as well as identifying excellent practice that can be shared with other schools in order to support the agenda of self-improving schools.

In year 4, the school would again receive a KIT visit. A further KIT may be agreed in year 5 or later, where the inspection timetable becomes considerably overdue.

Full QA (Ofsted Readiness) Visit

In year 3, the QA Ofsted Readiness visit will be a more in-depth school evaluation involving a team of relevant specialist advisors, and will include:

- A review of key information provided in advance of the visit e.g. School Self-Evaluation, School Development Plan, Safeguarding S175 audit (there is a requirement for the audit to have been externally validated either by the LA or an external provider within the previous 12 months.)
- A short pre-visit meeting for leaders to share their evaluation of improvements made in the areas for improvement identified during the last inspection, the Quality of Education, and to confirm visit arrangements and areas of focus. This meeting may be held virtually or in-person.
- The in-school visit will include discussions with the school's senior curriculum leader and leaders in subjects and other areas of focus, with an emphasis on their leadership and its impact. This will be led by the LA QA Link Officer supported by one or more LA Officers according to focus. The Leadership of Reading in school will always be an included area. There will also be discussions with pupils.
- Visits to lessons, looking at pupils' work and where possible discussion with teachers are also likely to be included.

- There will always be a focus on SEND and the Early Years Foundation Stage.

Risk Register and Schools Monitoring Group

The LA regularly maintains a risk register analysis of all educational establishments within the borough, in order to pre-empt difficulties and offer support, fulfil our statutory duties ([Support and intervention in schools statutory guidance](#) September 2025) and engage with local elected members, Ofsted, safeguarding complaints, and the DfE Regional Directors.

The Schools' Monitoring Group (SMG) meets each half-term to monitor progress in schools at risk of not sustaining an "effective" school judgement in their next inspection (Schools 'Requiring Additional Intervention & Support'), take decisions regarding the utilisation of Local Authority Powers of Intervention, engagement with the DfE Regional Directors, deploy School-to-School Support resources and broker HES support.

All teams within LA Children's Services relating to schools contribute triggers which could be areas of concern, or suggest vulnerabilities in relation to their areas of work. These triggers are published in **Appendix 1**. Triggers are not exclusive and other situations may arise from time to time. All service areas are represented at the SMG meeting, so that relevant information can be shared to identify any emerging vulnerabilities so that activity can be coordinated.

Schools 'Requiring Additional Intervention & Support':

There are five trigger points for a school to be deemed to be 'Requiring Additional Intervention & Support':

1. Prior to September 2024 Ofsted grading less than "Good" /suggestion less than "Good" following an Ungraded Inspection, or post September 2024 a school is judged not to be "effective".
2. LA year 3 Ofsted readiness QA suggests the school may not be judged to be "effective" at its next inspection.
3. Information gained during an LA KIT visit suggests significant risk.
4. LA identification following an SMG periodic risk register analysis e.g. attendance, behaviour, complaints, pupil outcomes suggests significant risk.
5. Self-identification by a school to generate additional support through strategic link officer.

Progress Review Meetings (PRMs)

For maintained schools (and academies by agreement), where a school is considered vulnerable and 'Requiring Additional Intervention & Support', the 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 if trigger 1 or 2 occurs and if required depending on outcomes of findings for trigger 3 or 4.
- Points 3, 4 and 5 will lead to a full school or area review and if deemed that the school is a vulnerable school, will be subject to regular PRMs.
- PRMs are meetings chaired by a senior LA Officer and are attended by the Headteacher, the Chair or Vice Chair of Governors and others by invitation of the LA Officer.

- PRMs will include an element of first-hand evidence validation undertaken with school leaders.

Their purpose 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.

Summary

For maintained schools, the activity described above as part of the wider Quality Assurance Cycle, PRMs, further in-school support such as a full school review, or review of an area of the school's practice, would all be funded from the de-delegated 'School Improvement Monitoring and Brokering Grant', and spend will be reported to Schools' Funding Forum. However, this is subject to Schools' Funding Forum approval.

PRMs are not mandatory for academies but can be offered if requested, but would be chargeable to cover direct costs of LA officer resource, as would any in-school support, such as a full school review or review of an area of the school's practice.

Appendix 1 – LA Children’s Services School Vulnerability Triggers

Admissions, attendance and behaviour

- High number of deletions from school registers – parents transferring schools
- High number of Permanent Exclusions being issued
- High levels of attendance absence
- High levels of referrals from schools requesting pupils directed ‘off site’
- High levels of suspensions / exclusions of pupils with undiagnosed SEND needs – where schools have not dealt with the basics
- A high number, significant increase in parents wishing to Electively Home Education as pupils unhappy with school
- A significantly high number of bullying incidents, reports and reasons pupils are not in a specific school

Asset Management

If schools chose **not to**

- Carry out their statutory tests and inspections on their school buildings i.e. building compliance
- Keep their school buildings safe and in good working order by tackling poor building condition and or health and safety issues.
- Use their devolved formula capital budget appropriately

Finance

- **Deficit Balances:** Schools with a deficit balance of more than £10,000 at the end of the previous financial year which they have not budgeted to recover within this financial year and there is no agreed recovery plan.
- **Deficit budget:** Schools setting a budget with an in year deficit ***in excess of £100,000 or 50% of their total balances at the end of the previous financial year***, with projections indicating this deficit will *increase over the next three years*.
- **High Surplus:** Schools carrying a budget surplus in excess of ***8% of their total income at the end of the previous financial year*** where the school has excess surplus balances and no agreed plan to use these.
- **Audit Outcomes:** Schools that received a ***‘limited assurance’ or ‘no assurance’ rating*** in their most recent internal audit or financial health check, highlighting significant weaknesses in financial controls, governance, and risk management practices.
- **Leadership and Financial Oversight:** Schools with a combination of an ***inexperienced or interim School Business Manager (SBM) and a newly appointed or interim Head Teacher***, indicating potential financial vulnerabilities due to a lack of experienced oversight in budget management.
- **Non-Compliance with Financial Reporting:**
 - (i) ***Failure to submit*** the school budget, three-year financial plan, or the Schools Financial Value Standard (SFVS) by the required deadlines.
 - (ii) ***Non-submission of monthly financial reconciliations for three consecutive months***, without a valid justification, despite repeated reminders from the local authority.
 - (iii) ***Failure to submit year end returns and backing documents by required deadlines or significant errors***
 - (iv) ***Poor quality forecasting and budgeting*** – a pattern of significant unforecast variances to budget

Governor Services

- High governor turnover
- Governor vacancies and lack of engagement by GB to fill vacancies
- Chair – new or lack of engagement
- Parental complaints
- Relationship between governors and SLT
- Meetings being re-arranged or not planned effectively
- Indications of lack of governor effectiveness
 - Gaps in skills / experience across the GB (evidenced by skills audit)
 - Evidence of lack of challenge (evidenced by meeting observation, feedback from clerks and minutes)
 - Lack of strategic working and/or over involvement in operational issues
 - Lack of clarity of roles and responsibilities by GB collectively or by individual governors and/or HT
- Non-compliance with GB Code of Conduct

Havering School Improvement Services (Hsis)

Leadership:

- Inexperienced Head Teacher –in first year of headship.
- New Head Teacher, not new to Headship
- Interim Head Teacher arrangements in place
- Lack of capacity of leadership team, including vacancies
- Substantial concerns raised following a S175 audit

Quality of Education:

- Leadership of overall Curriculum
- Leadership of a significant curriculum area or a number of areas
- Inappropriate use of alternative provisions
- Outcomes for pupils
 - Academic achievement
 - Other – PD/Well-being, support for mental health/Gatsby principles, benchmarking/Destinations/NEET/wider curriculum

Other:

- Concern re pupil behaviour/conduct
- Concern re low attendance/high persistent absence
- School recently amalgamated/become part of a federation
- Complaints, including from Ofsted
- Staffing: Absences/vacancies/turnover/ recurrent HR issues
- Lack of engagement with staff development opportunities
- Website –intelligence gathering pre a school visit e.g. PP, SEND, Reading... not compliant or out of date

Health & Safety

Management Audit Scores:

- Overall score <=50%
- Specific sections scores:
- Risk assessment <80%
- Maintenance <80%
- Inspection <80%

Human Resources

HR monitors Employee Relations casework and how schools perform in their duty under relevant school employment policies and procedures.

- Effective use of employment policies and procedures across the whole school that demonstrates best practice in the management and motivation of all school staff. Unlikely to have any active casework.
- Any active casework completed in line with policies/procedures with effective use of HR support/guidance provided.
- Employee Relations casework complex, requiring regular HR support/guidance, likely to lead to potential collective disputes (up to and including dismissal), and where the school is not effectively following HR advice and guidance.
- Significant Employee Relations casework (high number of cases or complex casework) requiring significant leadership input and requiring regular HR support/guidance and where the school is not effectively following HR advice and guidance. One or more of these cases is likely to lead to collective disputes, dismissal(s), settlement agreement(s) or possible Employment Tribunal claim(s).

SEND

- A high number or significant increase in parental complaints (either formal or informal) to the SEND Service
- A high number, significant increase in, or inappropriate or illegal use of reduced timetables, alternative provision, suspensions/exclusions
- A high number or significant increase in placement breakdowns or requests for change of placements for pupils with SEND
- Failure to comply with statutory requirements relating to SEND processes (e.g., consultation responses, annual reviews)
- Evidence of poor, exclusionary, or potentially illegal/discriminatory practice in regards to pupils with SEND
- Resistance or a lack of openness to external services and to support from external teams to develop SEND processes, practice, and promote inclusion

Schools Funding Forum 23rd October 2025

ITEM 6

Subject Heading:

High Needs funding 2025-26

Report Author:

Hany Moussa – Principal Education Finance Officer

Eligibility to vote:

Information only

SUMMARY

This report details the on the in-year and future years' projections for the High Needs block, and the upcoming changes in SEND that may arise because of the Schools White Paper.

RECOMMENDATIONS

That the Schools Funding Forum notes the report.

REPORT DETAIL

High Needs Block Funding update

DSG is forecasting a £28.5m overspend, equivalent to 14.8% of the total DSG budget. This position remains unchanged from the previous period. The overspend is entirely driven by the High Needs Block, which continues to face significant pressure due to rising demand for SEND provision, and there is a 65% overspend in comparison to the DfE's High Needs allocations for Havering. This highlights that the current funding formula from central government does not adequately reflect Havering's needs, a challenge shared by many local authorities.

DSG Block	DSG Allocation (post-recoupment)	Forecasted Expenditure	Forecast Variance	% of budget
Schools Block	98,731	98,731	0	0.00%
Central Schools Services Block	1,912	1,912	0	0.00%
High Needs Block	43,721	72,200	28,479	65.20%
Early Years Block	47,819	47,819	0	0.00%
DSG - overall	192,183	220,662	28,479	14.80%

This table shows the breakdown of forecasted expenditure and overspend across DSG blocks, highlighting the disproportionate pressure on the High Needs Block. The High Needs Block has a budget of £43.721m, with forecasted expenditure of £72.200m, resulting in a £28.479m overspend—equivalent to 65.2% of the block's budget. A £1.291m transfer from the Schools Block has been made to help mitigate this pressure.

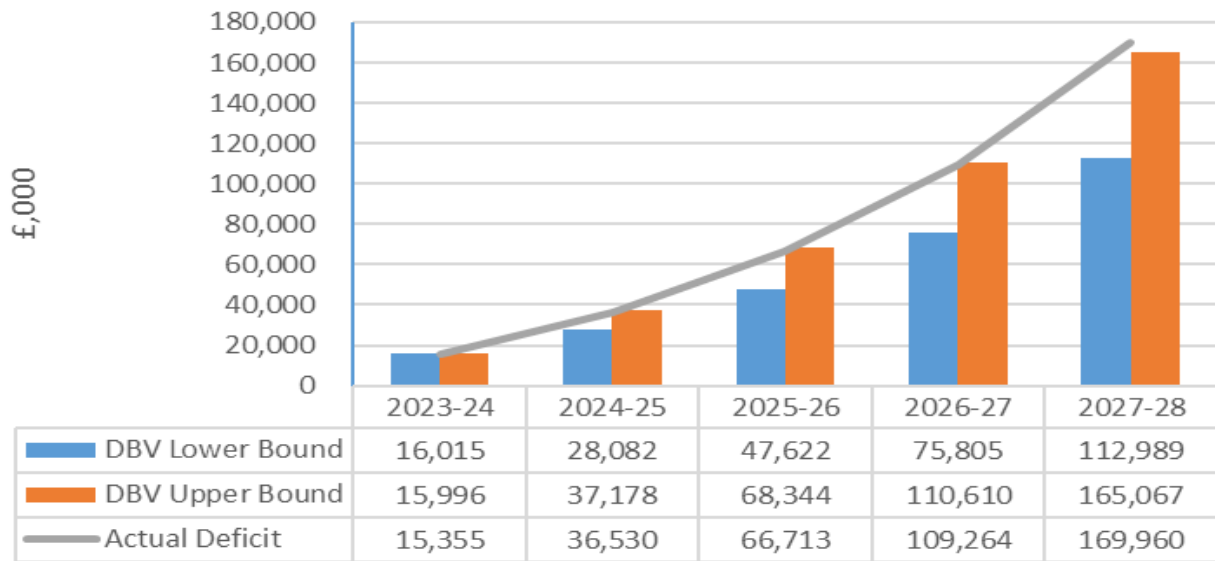
Key cost drivers include top-up funding for academies, colleges, and maintained schools, increased use of independent providers, and SEN support services. The following table provides a breakdown of the specific cost categories contributing to the High Needs overspend.

Section 251 Budget Category	Projected (£,000)
DSG High Needs Allocation (post-recoupment)	-43,721
Transfer from schools block to high needs block	-1,291
High needs place funding within Individual Schools Budget	2,129
Top-up funding – maintained schools	24,960
Top-up funding – academies, free schools and colleges	32,391
Additional high needs targeted funding for mainstream schools and academies	652
Top-up and other funding – non-maintained and independent providers	6,931
Other alternative provision services	1,227
Hospital education services	492
Support for inclusion	285
Direct payments (SEN and disability)	500
Therapies and other health related services	500
SEN support services	3,422
Total High Needs Budget Deficit	28,477

The cumulative DSG deficit is presently projected to reach £64.9m by the end of 2026-27. The Department for Levelling Up, Housing and Communities (DLUHC) has extended the statutory override for DSG deficits until 2027-28, reducing the immediate impact on the Council's general fund. The following chart shows the projected trajectory of the DSG deficit, including upper and lower bounds based on EHCP growth assumptions.

The DSG model assumes continued growth in EHCPs and rising unit costs, aligned with historical trends. Havering was previously part of the DfE's Delivering Better Value (DBV) programme and was recognised for strong financial management and value for money in its DSG allocation.

DSG Deficit 2023-24 to 2027-28 Forecast



In addition, nationally, the government has committed £760m to support the SEND reform, as part of the upcoming Schools White Paper, with £547m in 2026-27 and £213m in 2027-28.

This is in addition to the £1.5bn already earmarked for core School funding, which includes DSG and other existing grants.

The upcoming Schools White Paper, expected in Autumn 2025, is anticipated to introduce changes to how schools support children with additional needs. These reforms may have significant implications for future funding and delivery models, and this will be closely monitored by the LA as part of the wider SEND transformation programme that it is carrying out.



Schools Funding Forum 23rd October 2025

ITEM 7

Subject Heading:

**Central Schools Services Block (CSSB)
2026-27**

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 2026-27 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 2026-27
- (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 2026-27 is shown below.

The DfE 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 2026-27 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 November.

In advance of the announcement, below is the projected allocation with an uplift of 3.0% to the per pupil rate for the CSSB. The table below has comparable data from 2025-26.

	Ongoing responsibilities			Historical commitments	Total CSSB
	Pupil nos.	Per pupil £	£	£	£
2026-27 projected	39,883.0	47.43	1,891,651	60,292	1,951,943
2025-26 final	39,883.0	46.05	1,836,613	75,365	1,911,978
Difference	0	1.38	55,038	-15,073	39,965

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 2025-26 version as the basis for the 2026-27, due to the delay of the release for 2026-27 allocations and guidance. For Havering, these services are as follows:

Ongoing responsibilities	Final 2025-26 £	Projected 2026-27* £	Projected change £	Projected change %
Copyright licences	280,000	288,400	8,400	3.0
Admissions	597,932	615,870	17,938	3.0
Schools Forum	49,087	50,560	1,473	3.0
LA responsibilities to all schools	909,594	936,821	27,227	3.0
Total	1,836,613	1,891,651	55,038	3.0

Historical commitments	Final 2025-26 £	Projected 2026-27* £	Projected change £	Projected change %
Schools Partnerships/Schools Causing Concern	75,365	60,292	-15,073	-20.0
Total	1,911,978	1,951,943	39,965	2.1

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 £288,400 has been included. Areas relating to salary costs have been increased by 3.0%. The actual increase in cost is likely to be aligned or more than what has been projected.

Historic Commitments element

Continuing the financial year arrangements for this element of the grant, the LA is proposing that for 2026-27 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.

Schools Funding Forum 23rd October 2025

ITEM 8

Subject Heading:

Early Years – funding update

Report Author:

Hany Moussa – Principal Education Finance Officer

Eligibility to vote:

Information only

SUMMARY

This report outlines the revision to the estimated carry-forward and confirmation of the distribution of the supplementary rate paid in the summer term from the carry-forward.

RECOMMENDATIONS

That the Schools Funding Forum notes the report

REPORT DETAIL

1. 2024-25 DSG Early Years carry-forward update

Following the July 2025 update of the 2024-25 Early Years funding allocations, an update to the previously reported carry-forward balance has been confirmed. The revision relates primarily to the 2024 autumn term PTEs. Havering's internal calculations remain correct, however, earlier internal figures overstated the PTEs compared with the data the DfE collected from the Census returns.

The PTEs used for Havering's 2024-25 final funding allocation for the new working parents entitlements, with weighted PTEs reflecting the number of weeks funded per term (Summer = 12, Autumn = 14, Spring = 12), are shown below:

	2YO WP		Under 2s WP	
	PTEs	Weighted PTEs for the term	PTEs	Weighted PTEs for the term
Summer 2024	1121.60	354.19	N/A	N/A
Autumn 2024	1382.54	509.36	1029.58	379.32
Spring 2025	1329.01	419.69	1080.11	341.09
Total PTEs for funding allocation		1283.23		720.41

The impact to the accrued amount, which formed the carry-forward amount, is as follows:

Category	Age	Funding Factor	LA £,000	DfE £,000	Difference £,000
Existing entitlements	Three/Four Year Old	Universal	-95	-95	0
	Three/Four Year Old	Extended	121	121	-0
	Two Year Old	Disadvantaged	-233	-188	44
	Three/Four Year Old	Pupil Premium	14	14	-0
	Two Year Old	Pupil Premium	-6	-1	5
New Entitlements	Two Year Old	Expansion	705	-86	-791
	Under Twos	Expansion	110	110	0
	Under Twos	Pupil Premium	1	1	-0
Total			618	-124	-741

As a result of the update, the overall Early Years carry-forward balance is revised from the originally disclosed amount of £1.744m to £1.003m as below, with the agreed distributions indicated.

	Original	Revised	
Total	1,744	1,003	
Under Twos	615	615	Allocated to EY providers as a supplementary hourly rate for all entitlements for the Summer term claims
2 year olds	756	15	
3&4 year olds	-2	-2	
Provision for Early Inclusion Funding	221	221	earmarked for SEN/SENIF
Centrally retained	154	154	earmarked for Central Costs

The overall funding for the supplementary rate was revised and the supplement for Summer term only was for 32p per hour. This was valid for all claims in the summer term and the funding was made payable at the end of the term. The distribution and average for each type of setting is as per the table below.

Provider Type	No. of providers	Total Funding Allocated	Average
Academy School	6	20,831.04	3,471.84
Childminder	82	35,676.75	435.08
Day Nursery	59	301,732.99	5,114.12
Independent School	5	10,704.64	2,140.93
Maintained School	18	79,619.00	4,683.47
Out Of School Care	1	24.96	24.96
Preschool	64	172,872.32	2,701.13
Grand Total	235	621,461.70	2,655.82