

Schools Forum Agenda

Tuesday 14 June 2022 at 2.00 pm

This meeting will be held remotely. If you'd like to observe the meeting please contact: David.Abbott@lbhf.gov.uk

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Date issued: 07 June 2022

Agenda Item 1

Hammersmith & Fulham Schools Forum – 15 March 2022 Minutes of the meeting

NOTE: This meeting was held remotely

Present

Voting members	Non-voting members
<p>Primary School Heads Claire Fletcher, St Paul's CE Primary Sam Naismith, Flora Gardens Primary Kathleen Williams, Holy Cross Primary Michele Barrett, Randolph Beresford / Vanessa Nursery</p> <p>Academies and Free Schools Gary Kynaston, Hammersmith Academy (Chair)</p> <p>Non-Schools Members Jane Gleasure (Little People, Early Years PVI)</p>	<p>Observers Chantelle Thomas-Payne, Business Manager Aidan Smith, Governor Alex Parker, Business Manager Jacqueline Munro, Business Manager</p>

Officers

Jacqui McShannon (Director of Children's Services)
Jan Parnell (Director of Education)
Tony Burton (Head of Finance for Children's Services and Education)
Adele Patriciello (Senior Accountant)
Satwinder Saraon (Head of SEND Development)
Valerie Irolla (Principal Accountant)
Urmilla Dattani (Accountant)
Julia Norton (Finance Trainee)
David Abbott (Head of Governance)

1. **WELCOME, INTRODUCTIONS AND MINUTES**

Apologies

Apologies were received from Karen Cunningham, Daniel Upfield, and Joe Brown.

RESOLVED

The minutes of the meeting held on 18 January 2022 were agreed as an accurate record.

2. SCHOOLS BUDGET 2022/23 UPDATE

Tony Burton (Head of Finance for Children's Services and Education) presented the report that confirmed the funding allocations proposed and agreed by Schools Forum in January 2022. The report also proposed the allocation of £200k falling rolls funding and the proposed deployment of the Central Services Schools Block of the Dedicated Schools Grant for 2022/23.

Tony Burton noted that the falling rolls support worked out to just under £1,000 per place lost. The support was intended for schools with significant year-on-year roll reductions.

He also noted that officers continued to make efficiencies in central services planned expenditure and that would be used to support the High Needs Block. That approach supported the safety value agreement with the Department for Education.

RESOLVED

1. Schools Forum agreed the proposed Falling Rolls allocations and agreed payment of the allocations proposed in April 2022.
2. Schools Forum approved the recommended Central Services Schools Block budget for 2022/23 totalling £2.817m.

3. EARLY YEARS BUDGET 2022/23 FINAL

Tony Burton (Head of Finance for Children's Services and Education) presented the report which provided the results of the consultation on the 3 and 4 year olds Draft proposals for 2022/23 and presented the 2022/23 Final Budget model for approval.

Members requested a breakdown of the use of the Central Services budget (early identification etc.) Tony Burton agreed.

ACTION: Tony Burton

RESOLVED

1. Schools Forum agreed the final 2022/23 Early Year budget including an increase to the base rate from £6.26 to £6.39 and proposed hourly rates for deprivation detailed above in Table 1 and Table 2 of the report.
2. Schools Forum agreed the final Early Years Central Services Budget for 2022/23 as detailed above in Table 4 of the report, totalling £0.743m.

4. SCHOOLS BUDGET 2021/22 Q3 MONITORING

Tony Burton (Head of Finance for Children's Services and Education) presented the report which provided an update on the 2021/22 quarter 3 budget monitoring position for the Dedicated Schools Grant covering the High

Needs Block, the Schools Block including de-delegated budgets, the Central Services Schools Block, and the Early Years Block.

Tony Burton highlighted that there was a £0.75m Schools Block surplus and the proposed uses of that balance included contingency support for maintained primary schools, asbestos management and surveys, and returning money to contributing schools. The Chair asked if it had been reported through the Primary Heads group. Tony Burton said officers had been working with a group of Primary Heads on falling rolls and would report back to the main Primary Heads group for peer review of the proposals. Members supported a clear and transparent process.

The Chair noted that there were additional funding pressures on schools, most significantly the large increases in energy costs and the Government's instruction that schools should be saving money for teaching staff pay uplifts. Confirmation of pay increases won't be made available until July but schools were anticipating around 3 to 5 percent.

Tony Burton said the financial situation for schools would be very challenging without additional funding given the scale of inflation and pay increases.

A member asked if the pensions contributions rate was also being increased. Tony Burton said he would find out and communicate that to schools.

ACTION: Tony Burton

Members asked if the borough was taking on refugee children from Ukraine. Jan Parnell and Jacqui McShannon said discussions were taking place at the moment. The Government were offering funding per person for education and related needs. Once it was confirmed officers would communicate it to schools.

ACTION: Jan Parnell

RESOLVED

Schools Forum noted the report.

5. DRAFT WORK PROGRAMME (FOR INFORMATION)

The draft work programme was noted.

6. ANY OTHER BUSINESS

None.


Meeting started: 2.00 pm

Meeting ended: 2.55 pm

Chair

Contact officer: David Abbott, david.abbott@lbhf.gov.uk

Agenda Item 2

	London Borough of Hammersmith & Fulham SCHOOLS FORUM June 2022
Q4 Update: High Needs Block 2021/22	
Open	
Classification: For Scrutiny Review & Comment Key Decision: No	
Wards Affected: (All Wards): All	
Accountable Director: Jacqui McShannon, Strategic Director of Children’s Services	
Report Authors: Joe Gunning - Programme Lead, Children’s Services Jan Parnell – Director of Education	
Purpose of the report This report provides an update on the High Needs Block programmes of work and performance against the Safety Valve agreement at Q4.	

Recommendations:

1. Schools Forum to note the current position of the High Needs Block (HNB) and forthcoming transformation programmes.

Programme Update

Workstream:	Early Intervention and development of robust Local Offer
Progress update: <ul style="list-style-type: none"> • There is a good level of progress being made in embedding the early intervention and local offer to support children and young people with SEND. <u>Early Years Identification and Inclusion Fund</u> <ul style="list-style-type: none"> • SENIF is becoming well embedded within Early Years settings; the fund was fully committed in 2019/20. • With predicted higher levels of need post pandemic, the Early Years funding available has been increased to £500,000 for 2021/22 and £639,000 in 2022/23. • A SEN audit has been completed to support matching funding to emerging needs in the sector. • An Early Years SEN specialist resource has been proposed for 2022/23 as part of the Early Years funding proposals. <u>Specialist Teacher Surgeries</u>	

- Specialist Teacher surgeries continue to run post COVID and are becoming embedded as part of the early intervention offer.
- In January the number of surgeries has been increased to two sessions per week, each with four bookable slots available.

Themes:

- Individual CYP advice with regards to ASD; Literacy & Numeracy difficulties; Hearing Impairment
- Review of evidence for EHCNA
- Advice re access to other services e.g. OT
- SENCO support with LA documentation & processes
- Advice regarding working with parents
- Support with use of and training of additional adults
- Understanding/explanation of reports & advice and support with implementation of suggested interventions/advice

Activity/input to date:

- Bespoke training provided
- INSPIRE staff supported in parent meeting
- Signposting & follow up support with learning resources
- Referrals to other services as appropriate
- Follow up ASK US! sessions agreed
- Sessions already booked in for Spring Term

SEND Inclusion Team Panel

- The SENIT Panel launched in February.
- Panel members have been inducted – reviewed terms of reference, aims of panel and sample cases.
- Data tracking procedures are in place.
- The panel will be embedded across the next quarter.

ASD Diagnostic Pathway – Joint Health Funded Role

- An EP is being onboarded beginning of February. The EPs will have various tasks initially looking at building a comprehensive map of services at the pre-diagnosis phase, identifying gaps and mitigations that can be implemented as part of the project.

SENCO Workshop/Workforce Development

- Good progress is being made in embedding the Ordinarily Available offer and Early Intervention approach across schools via SENCOs and Headteachers through a series of workshops and training sessions as well as joint working with SENDIASS and the parent/carer forum ParentsActive.

Key next steps:

- Continued implementation of workforce development plan to increase knowledge and understanding of early intervention pathway across the SEND system to ensure it is well understood and used
- Analyse results of audit findings to ensure programmes align to emerging needs
- Embed routine data collection arrangements to assess take up and monitor impact of the various stages of the pathway

Workstream:	SLCN Early Intervention Offer
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Progress update:

- All service documentation has been approved and signed off.
- Progression tools for schools have been purchased.
- 1 x Specialist Teacher and 1 x Speech and Language Therapist (SLT) have been onboarded.
- Unsuccessful recruitment to 1 x Specialist Teacher post - as a result this post will be re-advertised. This does mean there will be less capacity within the core team than originally anticipated, however the Speech and Language Therapist will be deployed in the interim until they establish a Specialist caseload.
- New starters are completing their induction programme.
- A workshop is being scheduled with Panel Chairs on the new offers as part of workforce development.
- SLT advice writers have been briefed on the Joint Communication Team service framework.
- As a result of some of the delays in recruitment and the ongoing COVID challenges in schools including high staff absences, the roll out of the Joint Communication Framework is going to be lighter than anticipated this term. In particular it will focus on the universal offers and role of the Progression Tools.

Key next steps:

- Roll out of service framework with a particular focus on universal trainings in the Spring term, including Identification of SLCN, Audit Tools, SLCF and Communication Trust Progression Tools. Once schools have attended the Progression Tools training the school will receive their copy of the tool for them to implement. This will provide the opportunity to obtain baseline pupil level data.
- Across the summer term, the roll out of the targeted SLCN workshops will commence, to provide the school workforce with the skills to support children/young people with SLCN identified through the Communication Trust Progression Tools as part of the assess, plan, do, review cycle.
- New Local Offer pages to reflect offer.
- Embed data tracking, monitoring, and reporting framework in service.
- Recruitment to 1 x Specialist Teacher – Spring term 2022.
- Initial baseline review – end of Spring term 2022.
- Impact review – end of Summer term 2022.

Workstream:	SLCN Special School Offer
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Progress update:

- Following regularisation of funding to include the delivery of therapies, two of the three special schools have indicated that they wish to make their own SLT arrangements.
- Notice has been served to the provider for both Cambridge and Woodlane school from the central contract effective from June and July 2022.
- Discussions are ongoing with the provider to confirm TUPE and contractual implications and to support brokering an independent relationship should the schools wish to proceed on that basis.
- To deliver the part effect of the saving, recharge arrangements are being implemented in the interim for these two schools to cover the cost of the contract following regularisation of funding until they have exited the contract.
- Officers have yet to reach an agreed position with Queensmill Academy Trust regarding developing a whole school therapy approach within their core funding

and discussions remain ongoing. These challenges have therefore impacted the LAs ability to progress the conversations in relation to therapies and achieve the intended savings target until a resolution has been found on their core funding.

Key next steps:

- Continued negotiations with Queensmill Academy.
- Ongoing support to Woodlane and Cambridge in exiting central contract and developing independent solution.

Workstream:

Autism Education Trust (AET) Early Intervention Offer

Progress update:

- An extensive introduction to the AET Program for settings and schools during the first half term has been planned and publicised via the Learning Partnership.
- 21 Training Sessions for “Making Sense of Autism” have been scheduled (19 delivered) which is the awareness-raising module for practitioners in Early Years, Schools and Post 16 provision.
- To provide as many opportunities as possible and to engage with as wide a range of staff as possible the service is delivering training for different phases and different groupings of staff for varied durations and times of day for delivery.

Key next steps:

- Delivery of remainder Making Sense of Autism training sessions.
- During Spring Half Term the service will also start to rollout the “Good Autism Practice” module as well as the new “Leadership module” for Senior Management Teams which will include both the Standards and the Competency Frameworks and will provide tools for settings and schools to develop their Autism Action Plans as part of their Annual Provision Development Planning as well as informing staff continuing professional development.
- Target for recruitment of Communication & Interaction Specialist Teacher to be completed by February Half Term.

Workstream:

SEND Case Management, Reporting and Quality Assurance (QA)

Progress update

Case Management:

- Process mapping sessions completed to update EHC processes in order to help produce user guides.
- Increased use of Synergy by frontline delivery teams (core casework) monitored via weekly report.
- Officers are working on resolutions to implement the Finance module by end of February 2022.
- Operational reports continue to be developed and implemented to enable performance monitoring. Officers are working to establish data outputs from the Case Management system to support moving to the next step of dashboard development in line with the proposed investment in BI.

Managing data

- Development of an interim operational and performance report dashboard.

- EHC performance data is monitored at a fortnightly management meeting to ensure the timeliness of statutory casework with data also presented to HNB Board and monthly updates to DCS.
- Children's Service are progressing investment into Corporate BI to support developing appropriate performance frameworks and dashboards to enable live performance monitoring and to utilise BIs skills and expertise in this area.
- A new Education Performance and QA post is also being progressed. This post will lead on performance and quality assurance across Education; working closely with Business Intelligence and the Education Leadership Team to develop and embed a performance and quality assurance framework across Education.

Key next steps:

- Continue to embed functional EHC case management system workflows including Finance.
- Long-term BI dashboard solution.
- Data and performance audit reports.

Workstream:	Panels, needs assessments and new plans
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Progress update:

SEN Support and Inclusion Panel (SENDIT)

- See above in Early Intervention and development of robust Local Offer.

SEND Panel

- Key leads are monitoring panel attendance to drive accountability amongst the school system to strengthen the infrastructure to ensure panel is fully reflective of the school community and that chairs are assured that panel is quorate.
- Monthly panel attendance report shared with key leads for review and action where required.
- All EHCNAs now go to panel to ensure robust multi-disciplinary decision making.
- Work is ongoing to strengthen the management of panels including periodic audit of panel decisions and effectiveness of panel.

Key next steps:

- To embed SENIT Panel as part of our graduated approach and regularly evaluate impact.
- Panel Lead WFD on finance processes and finance workstreams in to be undertaken in the next period.
- Recruitment to Performance Improvement and QA capacity to establish and embed Performance Reviews and resolution data/performance audit reports.

Workstream:	Annual Reviews
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Annual Review progress update:

- Officers have developed an action plan to focus on strengthening performance of annual reviews and to ensure alignment to SEN2 reporting requirements.

Key next steps:

- establishing a clear baseline
- making best use of the case management system to ensure compliance
- workforce development across both the EHC service and partners

- using the network of professional in schools to support proactive planning and management of annual reviews

Workstream:	Alternative Provision Reduction of Place Commissioning
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Progress update:

- Place Commissioned numbers have been agreed and submitted in the Place Return in November to reflect current and forecasted demand.
- Negotiations remaining ongoing with the Academy Trust to agree a top-up to reflect the reduction in place commissioned numbers and activity.

Key next steps:

- Finalise negotiations with the Academy Trust to reflect place commissioned numbers.

Workstream:	Alternative Provision Funding Recoupment
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Progress update:

- Final communication issued to schools confirming implementation and approach.
- Exclusion activity has been lower than originally forecast and this has been reflected in the Q4 forecast.

Workstream:	Alternative Provision – Short Term Intervention
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Progress update:

- No further action required. Schools notified on interim funding arrangements with full funding withdrawal from Sept 2022 in a phased approach.
- The full saving target will be achieved in 2023/24.

Workstream:	Outreach Services
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Progress update:

- Negotiations with the Outreach provider are ongoing and as part of the AP place commissioned reduction discussions.
- Negotiations remain ongoing in agreeing efficiencies across the portfolio of commissioned arrangements with the Academy Trust.

Key next steps:

- Finalise negotiations with Academy Trust for 22/23 academic year.
- Roll out of new data capture and impact reporting processes – Summer term.
- Evaluation of data in Autumn term 22

In addition to the changes being implemented above, it is intended that referrals will also be managed via the SENDIT panel to ensure appropriateness of referrals and support a successful outcome in the mainstream environment via the team around approach.

Whilst a saving had been targeted for this area, it was proposed that the full amount be reinvested in a new model. The net effect is therefore nil.

Workstream:	SEN Sufficiency and High Needs Capital Allocation
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Progress update

SEN Sufficiency:

- The SEN Sufficiency review contract has been awarded and the provider onboarded.
- The provider is currently developing their action plan in collaboration with Officers with a view to undertake data analysis and benchmarking in February and then commencing engagement with the Local Area thereafter.
- A reference group has been established to bring together key stakeholders. The group will:
 - Bring together key stakeholders across the local area to share knowledge and expertise
 - Support developing key lines of enquiry with the commissioned provider undertaking the review
 - Review and test assumptions
 - Champion coproduction of the strategy and plan in the local area

High Needs Capital Allocation:

Current projects:

- DDA works at William Morris Sixth Form College
- Works at Cambridge Special School Safeguarding related boundary security (gates)
- Kitchen upgrade at Cambridge
- Finalising planned programme of works with Woodlane

Key next steps:

SEN Sufficiency

- Agree final action plan
- Phase 1: Understanding the local context, testing existing data modelling
- Phase 2: Gathering feedback and testing the sufficiency planning assumptions
- Phase 3: Co-producing a new SEN sufficiency strategy and plan

High Needs Capital Allocation

As per Q3 report, the implementation of the main body of the programme is aligned to the SEN Sufficiency Review:

- A HNPCA Steering Group including school and officer representation will be established by March 2022. This group will oversee the development and implementation of the procurement strategy for the programme.
- Subject to agreement with schools, detailed specifications of required works at the four resourced provision locations will be developed by October 2022 with a view to works being tendered in the autumn of 2022 and completed by summer 2023.
- The current planned programme of works in schools is based on condition surveys undertaken in 2019, updated and co-produced with schools. Updated condition surveys will be undertaken in the summer term of 2022 to inform the next update of the planned programme, again co-producing the agreed programmes of work with schools. As part of this process schools will be invited to express and interest in flexible use spaces. The aim is to update the planned programmes by the autumn of 2022 to cover the period April 2023 to March 2026 including delivery of the flexible use spaces in 2023/24.

Workstream:	High Needs Block Staffing Efficiencies
Progress Update:	

- No further action required. Costs transferred out of High Needs Block and pressures addressed as part of the Council's Medium-Term Financial Strategy (MTFS) planning.
- A further £200k saving has been achieved as part of Q2/Q3 mitigations.

Workstream:	Schools Block to High Needs Block Transfer
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Progress Update:

- As a result of some delays to the above programmes, a further Schools Block to High Needs Block transfer was recommended to Schools Forum in January 2022 which was approved on the 18th January 2022. [Agenda for Schools Forum on Tuesday, 18th January, 2022, 2.00 pm | LBHF](#)

Key next steps:

- No further action.


Workstream:	Interim Tuition
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Progress Update:

- Increased spend in this quarter meaning saving is forecasted to be down by £15,000 as a result of increased demand. Action is being taken to ensure full delivery in 22/23.

Key next steps:

- Line by line review of current cases to review packages allocated to ensure value for money and to align these to the revised unit cost methodology.
- Embed refined gatekeeping processes and delivery model for EHC tuition in lieu of a school place into business as usual at revised unit cost.
- Agree delivery model for Medical Needs / Home Tuition to drive access to learning and inclusion and to align to our inclusive approach ensuring schools make use of notional funding in the first instance before consideration of additional funding is given.

	<p>London Borough of Hammersmith & Fulham</p> <p>SCHOOLS FORUM</p> <p>Tuesday 14th June 2022</p>
<p>Dedicated Schools Grant Outturn 2021/22</p>	
<p>Open</p>	
<p>Classification - For Scrutiny Review & Comment</p>	

Agenda Item 3

Key Decision: No

Wards Affected: (All Wards); All

Accountable Director: Jacqui McShannon, Strategic Director of Children's Services

Report Authors:
Tony Burton
Head of Finance for Children's Services and Education

Purpose of the report

This report confirms the 2021/22 Outturn for the Dedicated Schools Grant and balances held at 31st March 2022.

1. Introduction

1.1. The summary outturn position on the Dedicated Schools Grant (DSG) for the 2021/22 financial year is outlined below.

DSG Block	2021/22 Budget	2021/22 Outturn	2021/22 Variance	DSG Bal at 31/03/22	Comments
	£m	£m	£m	£m	
Schools Block	39.255	39.945	0.690 Funded from reserves	0.065 Reserve	Retained underspend on schools in financial difficulty
Central Services Block	3.313	3.313	0	-	Nil variance after £1.25m transfer to support HNB expenditure

High Needs Block	24.920	24.617	(0.303) Favourable	11.820 Retained deficit	2021/22 in year favourable variance before £4.55m safety valve funding received
Early Years Block	14.694	14.460	(0.234) Favourable	0.234 Reserve	Favourable position pending 2021/22 ESFA adjustment
Total	82.182	82.335	0.153	11.521	Net deficit

2. Schools Block Outturn

- 2.1. All balances held with respect to all mainstream schools for Falling Rolls and established through the National Funding Formula process were passed through to schools in 2021/22, in accordance with the Schools Forum decision taken in March and grant regulations.
- 2.2. The outturn in 2021/22 on the Schools Block includes the payments made in year in respect of the funding brought forward from 2020/21 as agreed by Schools Forum. This accounts for £0.690m as shown above. The retained balance of funding for schools in financial difficulty at the 31st March 2022 is £0.065m.
- 2.3. It is proposed that the remaining unallocated balance of dedelegated funding for schools in financial difficulty is used in 2022/23 to support Flora Gardens during the period of uncertainty around rolls and future capital development. This subject to Schools Forum agreement.

3. Central Services Schools Block

- 3.1. The Central Services Schools Block outturn for 2021/22 was a £1.25m favourable variance versus grant of £3.1m.
- 3.2. The underspend was achieved through savings in advance of further reductions in the grant from 2022/23.

- 3.3. This underspend has been transferred to support High Needs Block expenditure in 2021/22, which has contributed to a favourable movement in outturn on the High Needs Block versus the Qtr3 monitoring report for 2021/22.

4. High Needs Block

- 4.1. The underspend of £0.3m at outturn 2021/22 represents a favourable movement of £2.4m versus the Qtr3 monitoring report 2021/22. This is after an increased contribution from the CSSB DSG.
- 4.2. The cumulative deficit on the HNB at 31/03/22 will be £11.82m. This is after the application of the £4.55m HNB Safety Valve Funding receipt and the £0.3m HNB 2021/22 underspend. This represents a £3.462m favourable movement in the retained deficit forecast at £15.282m in the Qtr 3 monitoring report.

5. Early Years Block

- 5.1. The carry forward to Early Years (EY) DSG reserve at 31st March 2022 is £0.234m.
- 5.2. The carried forward surplus represents the in year underspend on early years expenditure primarily on 3 and 4 year old funding.
- 5.3. The 2021/22 Grant allocation is subject to retrospective adjustment by ESFA in November 2022 when they are due to be revised for the January 2022 census. ESFA have indicated that they propose to revert to using January headcounts for funding calculations for 2022/23 onwards.
- 5.4. Officers should be able to estimate the impact of these retrospective changes to funding by the end of Qtr2 2022/23.

Report ends

Draft Work Programme 2022/23

Note: Dates and items to be confirmed

Tuesday 11th October 2pm

- Dedicated School Grant 2022/23 Qtr2 Report
- Annual Audit Update
- Budget Update 2023-24
- Scheme for Financing Schools Revisions

Tuesday 6th December 2pm

- Budget Update 2023-24
- Scheme for Financing Schools Revisions
- High Needs Transformation Update

Tuesday 17th January 2pm TBC

- Dedicated School Grant 2022/23 Qtr3 Report
- Budget Update 2023-24
 - Final Schools Block Budget Model
 - Draft Early Years Block Budget Model