

Schools Forum Agenda

Tuesday 14 November 2023 at 2.00 pm

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

<u>Item</u>	<u>Pages</u>
1. APOLOGIES FOR ABSENCE	
2. MINUTES OF THE LAST MEETING To agree the minutes of the previous meeting as a correct record.	2 - 7
3. HIGH NEEDS TRANSFORMATION UPDATE 2023/24 QUARTER 2	8 - 12
4. SCHOOLS BLOCK TO HIGH NEEDS BLOCK TRANSFER DISAPPLICATION REQUEST	13 - 22
5. SCHOOLS BLOCK MAINSTREAM BUDGET 2024/25 UPDATE	23 - 56
6. ANY OTHER BUSINESS	

Harriet.Bour@lbhf.gov.uk
www.lbhf.gov.uk/committees

Date issued: 06 November 2023

Agenda Item 2

London Borough of Hammersmith & Fulham

Schools Forum Minutes

Tuesday 3 October 2023

PRESENT

Voting members	Non-voting members
<p>Primary School Heads Elisabeth Stevenson (Lady Margaret School) Anne-Marie (Thames Federation) Dave Colins (Brackenbury School) Imogen Lavelle (The Good Shepherd) Joe Brown (Old Oak Primary)</p> <p>Academies and Free Schools Sally Brooks (Fulham Cross Academy and Fulham College) Daniel Upfield (Ark Swift Primary Academy) Gary Kynaston, Hammersmith Academy (Chair)</p> <p>Non-Schools Members Jane Gleasure (Little People, Early Years PVI)</p>	<p>Observers Alex Parker Aiden Smith Jacqueline Munroe</p>

Officers

Jacqui McShannon (Director of Children's Services)
Peter Haylock (Director of Education and SEND)
Tony Burton (Head of Finance for Children's Services and Education)
Irolla Valerie (Principle Accountant)
Daryle Mathurin (Strategic Lead - Education, Assets and Operations)
Satwinder Saraon (Strategic Lead for Education, Early Years and Transformation)
Anjeli Chadha (Principal Accountant)
Caroline Baxter (Finance Manager)
Joe Gunning (Programme Lead, Children Commissioning)
Amrita White (Clerk)
Harriet Bour (Assistant Committee Coordinator)
External – Freddie Adu (Queens Mill School)

Minutes are subject to confirmation at the next meeting as a correct record of the proceedings and any amendments arising will be recorded in the minutes of that subsequent meeting.

1. WELCOME, INTRODUCTIONS AND MINUTES OF THE LAST MEETING

The minutes of the previous meeting were agreed as an accurate record.

The new school members introduced themselves and would formally participate at the next School Forum in November.

2. APOLOGIES FOR ABSENCE

Apologies for absence were received from Michele Barrett, Randolph Beresford / Vanessa Nursery and Kathleen Williams.

3. NATIONAL FUNDING FORMULA UPDATE 2024/25

Tony Burton (Head of Finance of Children's Services and Education) presented the report that provided an update on the important changes in the National Funding Formula for Early Years. Additional funding was confirmed from September 2023 and information on the extended childcare offer with phased changes from April 2024.

The Chair highlighted that there were pressures in many different funding areas defined within this report.

Jane Gleasure (Little People, Early Years PVI) outlined that there was lack of information available in relation to the early years funding from April 2024 which prohibited them to plan effectively. She asked for further clarification to be provided on how the funding formula would be applied across the different age groups. In response, Tony Burton explained that officers had not received the final guidance yet. It was anticipated that the Under 2 rate would be higher than the 3 & 4-year-old entitlement to reflect the higher ratio of staff to provide the service to this cohort. It was noted that all forums with the Department for Education (DfE) had been attended. However, the final funding guidance rates of funding from April 2024 was currently unknown and an update would be brought to a future Schools Forum meeting.

The Chair requested that subject to availability of information from The Education and Skills Funding Agency, a paper be produced in time for the December Schools Forum meeting that would update providers on the early years budget for 2024/25.

ACTION: Tony Burton/ Peter Haylock

The Chair had requested for a virtual workshop activity take place to brief the early years providers once the full guidance was available. Finance colleagues to work closely with Peter and Tony on facilitating this workshop.

ACTION: Tony Burton/ Satwinder Saraon

RESOLVED

The Schools Forum noted the report.

4. HIGH NEEDS BLOCK FUNDING 2024/25 - SPECIAL PROVISION

Tony Burton (Head of Finance for Children's Service and Education) provided an update and summary of the key points. The report updated the forum on the final High Needs Block allocation for the financial year 2024/25 and updated on changes to the Dedicated Schools Grant conditions prescribed by the Education and Standards Funding Agency in relation to the High Needs Block.

The Chair clarified the ongoing pressures faced by the special school sector. Highlighting that the support staff were paid via a different mechanism to the teachers.

RESOLVED

The Schools Forum noted the report.

5. SCHOOLS BLOCK MAINSTREAM SCHOOLS BUDGET 2024/25

Tony Burton (Head of Finance for Children's Services and Education) presented the report and provided an update on the key points. It was noted that this report provided a briefing on the decisions required for the 2024/25 budget setting process for the provisional Schools Block allocation of the Dedicated Schools Grant, following the receipt of provisional funding allocations in Summer 2023 and the Authority Proforma Tool in August 2023. He outlined the three recommendations included within the report and the decisions required.

The Chair suggested when updating schools to break down the formula funding by factor for each school, so it is clearer how mainstream funding targets additional needs and SEN support and where additional funding is available for Education, Health, and Care Plans (EHCPs) via High Needs Top-up.

Tony Burton mentioned that for the 2024/25 budget it is a requirement for Local Authorities to set out and explain Notional SEN funding within the School Block. Further information and consultation on Notional SEN will follow later in the Autumn Term. As the Notional SEN is not an additional cash allocation it does not impact the modelling for indicative budget shares for mainstream schools in 2024/25.

ACTION: Tony Burton

The Chair said that it would be useful to contextualise the High Needs Block (HNB) financial position with the safety valve agreement. In response Tony Burton explained that the safety valve monitoring update for Q2 would be considered alongside the Schools Block to High Needs Block transfer proposal agenda item at the November Schools Forum meeting.

ACTION: Tony Burton

The Chair congratulated Tony Burton and the finance team for their work on maintaining this effectively.

RESOLVED:

The schools Forum approved the following recommendations:

1. Model 1 is recommended prior to consultation with schools with the following key features:
Sets the Minimum Funding Guarantee funding increase on pupil led factors for 2024/25 at 0.5%.
 - Mirrors the National Funding Formula factor rates during the transition to the hard national formula and allows for 0.94% uplift on inner London NFF rates
 - Continuation of Schools Block to High Needs Block Transfer at 1% (equivalent to £1.188m on the provisional allocation 2024/25)
Zero Falling Rolls Fund be available from the 2024/25 budget.
2. It is recommended that Schools Forum agree for the LA to consult schools on the basis of the above provisions contained within Model 1 – see consultation document in Appendix 5.
3. It is recommended that the total deductions for maintained schools de-delegated and statutory education functions increases by 4.4% which is commensurate with the increase in core Schools Block funding year on year to 2024/25.
 - This includes the increase associated with the increase in MSAG mainstreamed into the block from 2024/25.
 - Remaining inflationary pressures in statutory services will be offset by a corresponding reduction in the contingency budget for maintained primary schools in financial difficulty as per section 4 of this report.

6. DEDICATED SCHOOLS GRANT MONITORING QUARTER 2 2023/24

Tony Burton (Head of Finance for Children's Services and Education) presented the report and provided an update on the key points. The report updated the forum on the 2023/24 Q2 budget monitoring position to the allocation received in July 2023 from the Education and Skills Funding Agency (ESFA).

The Chair emphasised that this was an informative paper, and the key points were summarised well.

In response to a question Tony Burton clarified that the Council had safety valve funding profiled up to the 2024/25 financial year. The HNB funding

growth would be monitored closely by officers in line with the dedicated schools grant reporting as well as the safety valve reporting.

The Chair requested that an overall position in relation to the HNB and details of the safety valve agreement be provided to schools during the Autumn term.

ACTION: Tony Burton

RESOLVED

The Schools Forum noted the report.

7. DRAFT WORK PROGRAMME UPDATE (FOR INFORMATION)

An update on the Draft Work Programme was provided.

8. ANY OTHER BUSINESS

Freddie Adu (Queensmill School) highlighted a funding concern regarding Queensmill School. Freddie Adu outlined that there was a disproportionate effect on special schools. He felt that Queensmill was in a unique position as it was not a maintained school, and their current financial position was extremely concerning.

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The Chair and members recognised the challenges faced regarding underfunding.

The Chair recommended that Freddie Adu raise these issues at the special schools meeting and work closely with Peter Haylock, Daryle Mathurin and Tony Burton, on the current state of Queensmill School.

**ACTION: Freddie Adu, Tony Burton, Peter Haylock,
and Daryle Mathurin**

Peter Haylock (Director of Education and SEND) responded to the concerns raised by Freddie. He sympathised with the challenges presented.

It was noted that all funding increases were allocated equally across schools. Item 5 in the agenda pack detailed the additional funding provided to Hammersmith and Fulham Special Schools through the provisions of the National Funding Formula and High Needs Operational Guidance. This covers additional pay grants and supplementary funding provided by the Education and Skills Funding Agency in recent years.

Additionally, Peter Haylock noted the additional discretionary top-up funding agreed by Hammersmith and Fulham from 2023/24 for Queensmill School.

Officers would continue to have conversations with the ESFA regarding this matter and feedback to Freddie Adu.

The Chair also noted that this was a challenge faced by all schools in terms of funding and that it was the role of all schools to deal with the funding challenges within the high needs block as a group.

RESOLVED

The Schools Forum noted the report.


Meeting started: 2:00pm
Meeting ended: 3:45pm

Chair

Contact officer: Harriet Bour
Governance and Scrutiny
E-mail: harriet.bour@lbhf.gov.uk

Agenda Item 3

Item 3

	London Borough of Hammersmith & Fulham SCHOOLS FORUM November 2023
Q2 Update: High Needs Block 2023/24	
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: Peter Haylock – Operational Director of Education and SEND Joe Gunning - Programme Lead, Children's Commissioning	
Purpose of the report This report provides an update on the High Needs Block programmes of work and performance against the Department for Education Safety Valve Agreement at Q2.	

Recommendations:

1. Schools Forum to note the current position and progress of the transformation programme across the High Needs Block (HNB).

Q2 2023/24 - Programme Update

Work programme	Assurance Level		
Increase early intervention activity and development of a more robust Local Offer	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Green	Green	RAG
<p>Progress Update:</p> <p>Good progress continues to be made in relation to our early intervention offer. The new Ordinarily Available Guidance was approved by Cabinet following consultation across the local area. Work is currently underway with our designers to create an accessible PDF version.</p> <p>We have recruited to a new Local Area SENDCO role who will support settings in mapping their SEND Support offer to the Ordinarily Available Guidance and embedding this in practice. An activity plan for this work is being agreed by the Education Leadership Team to commence from September 2023.</p> <p>Officers continue to roll out the Autism Education Trust programme to settings. The</p>			

team continues to roll out the Autism Education Trust programme - Making Sense of Autism and Good Autism Practice modules with delivery of 34 sessions across Early Years and Schools. There is ongoing targeted work with schools who had not previously engaged (3).

Good progress continues to be made in establishing a SEN Support Speech, Language and Communication Needs Offer. Extensive work has been undertaken to support the impact reporting of this offer. A new data dashboard has been established to help inform the future delivery of the programme. 69% of primary schools have engaged and 54% of secondary schools. Targeted work in underway to support those schools who have not yet engaged. Attendees of the early intervention training report a three-point increase in knowledge post training (10-point scale). Eight settings have now completed the training, undertaken initial screening of their cohorts, followed by two terms of interventions, and have then rescreened the cohort. The assessment domains are RAG rated. Following two terms of interventions red ratings have decreased from 5% to 1%, Amber from 61% to 37%, and Green has increased from 34% to 62%. The % proportion of the EHCP cohort where speech, language and communication is the primary need has also remained static demonstrating the positive impact of this work in reducing escalation to specialist pathways and provision.

Work programme	Assurance Level		
Review of Alternative Provision model	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Green	Green	RAG

Progress Update:

This workstream is complete.

Work programme	Assurance Level		
SEND Sufficiency Review and School Organisation Plan	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Amber	Amber	RAG

Progress Update:

The delay in savings in this workstream have been mitigated via S106 diversion.

The SEND Sufficiency Review was approved by Cabinet in June 2023. This is now published on the Council's website. [H&F SEND Sufficiency Review \(lbhf.gov.uk\)](https://www.lbhf.gov.uk).

Business planning meetings have been held with all Special Schools and Resourced Unit provisions in response to the recommendations of the SEND Sufficiency Review. The outcomes of these meetings have been developed into the Special School Organisation and Capital Plan which sets out the programme of investment in our school estate to meet the needs of children and young people

with SEND locally across mainstream, resourced and special provision.

It delivers on the ambitions of the local area's SEND Strategy and builds on the detailed analysis of trends in demand for specialist provision recommended in the SEND Sufficiency Review.

The plan sets out a framework for capital investment of £8 million in enhancing provision across the borough for pupils with SEND. This plan is due to be approved by Cabinet in September.

Work programme	Assurance Level		
Review and reform of outreach services	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Amber	Amber	RAG

Progress Update:

A graduated approach has been proposed with the provider in establishing a redesigned provision, creating a robust, universal, targeted and specialist offer. The targeted and specialist offer would be a traded model to schools realising the savings target. Meetings are scheduled with school partners during the autumn term ahead of progressing this model for implementation from April 2024.

Work programme	Assurance Level		
Case Management system	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Amber	Amber	RAG

The SEN case management finance module has been implemented. There is ongoing resolution of the finance module output queries between the EHC Casework Service and Finance team to improve the quality of reporting. A business case has been approved for short term General Fund investment into Business Intelligence to support a system review and streamlining of associated finance and business support workflows to improve data quality, processes for forecasting and payments to providers.

A quick win workshop has been completed. Capacity has been onboarded to progress this work. A Business Analyst and Developer are currently undertaking 'as is' process mapping across the services. Target programme date is March 2024.

Work programme	Assurance Level		
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Annual Reviews	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Amber	Amber	RAG
<p>Progress Update:</p> <p>Work in ongoing to implement a new Business Intelligence tracker for EHCP annual review activity to support data quality with the resolution of Synergy casework recording. A new Annual Review Coordinator is currently being onboarded and is due to start in early September. This role will focus on working with schools and partners to ensure timely returns. SENCO training was delivered to primary and secondary settings during the 2022/23 academic year on annual reviews, including person centred planning and preparation for adulthood outcomes. A task and finish group has been established to progress key activities including ongoing workforce development. The new local area guidance on annual review will be published in early September.</p> <p>Extensive work between Children's and Adult's Services has resulted in the agreement of joint priorities for transitions planning and Preparation for Adulthood. A business case is currently being progressed via the Corporate Medium Term Financial Strategy process. A monthly programme meeting has been established, jointly chaired by the DCS and DASS to oversee progress.</p>			
Work programme	Assurance Level		
Needs assessments and new plans	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Green	Green	RAG
<p>Progress Update:</p> <p>Our performance remains very positive in relation to decision needs assessments and new plans. The timeliness of EHC Needs Assessments continues to be positive at 90.3% year to date, against the England average of 50.7%.</p>			
Work programme	Assurance Level		
Medical Needs Guidance	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Green	Green	RAG
<p>Progress Update:</p> <p>The final version of the Medical Needs Guidance has been approved via governance. This has now been uploaded to the Local Offer (Medical needs policy London Borough of Hammersmith & Fulham (lbhf.gov.uk)) and shared with school</p>			

partners. The Medical Needs Officer will continue to work in partnership with schools to promote inclusion and positive attendance for children with medical needs. This workstream is complete and transitioned to business as usual.


Work programme	Assurance Level		
Schools Block to High Needs Block disapplication	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Green	Green	RAG

Progress Update:

Work in progress to submit disapplication request to the Safety Valve Team by the 17 November. The indicative timeline for this activity is as follows:

- 2 August - Education DLT (strategic steer)
- 6 September - Education DLT (draft papers)
- 12 September – Children’s Leadership Team
- 18 September – Cabinet Member Briefing
- 3 October - Schools Forum (budget models and draft disapplication pro-forma)
- 3 October - Launch consultation
- 8 October - School workshops
- 31 October Close consultation
- 7 November – Children’s Leadership Team
- 13 November – Cabinet Member Briefing
- 14 November - Extraordinary Schools Forum
- 17 November - Deadline for submission

Item 4

	<p>London Borough of Hammersmith & Fulham</p> <p>SCHOOLS FORUM</p> <p>November 2023</p>
<p>High Needs Block 2024/25 Disapplication Request</p>	
<p>Open</p>	
<p>Classification - For Decision</p>	
<p>Key Decision: No</p>	
<p>Wards Affected: (All Wards): All</p>	
<p>Accountable Director: Jacqui McShannon, Strategic Director of Children's Services</p>	
<p>Report Authors: Peter Haylock – Operational Director of Education and SEND Joe Gunning - Programme Lead, Children's Commissioning</p>	
<p>Purpose of the report This report sets out the context of the disapplication request for 2024/25 to support mitigating the High Needs Block budget pressures over the medium term.</p>	

Recommendations:

1. Schools Forum approves the 1% disapplication request from the Schools Block to the High Needs Block for the 2024/25 financial year.

Context

1. The Councils transformation programme had been in design and delivery for over two years prior to the Safety Valve Agreement and we have invested significant resources to deliver system change. We aim to move the block onto a more sustainable footing, through building capacity in schools to meet a greater level of need earlier at universal and targeted (SEN Support). Despite this, and in the context of updated funding assumptions from the DfE, there continues to be a budget gap in 2024/25 and 2025/26. These pressures require mitigations resulting in this disapplication request to ensure the High Needs Block spend is within the annual allocation.
2. There are five key drivers that have led to the request:
 - To address pressure on budget from cost inflation since Safety Valve agreement.
 - Lower than originally forecast HNB funding increases now assumed than that originally modelled per DfE's advice.
 - Special MFG at 3% and Special Provision Supplementary Grant from 2023/24 Financial Year

- To maintain the continued investment of High Needs into H&F mainstream provision.
 - Lack of local placement sufficiency resulting in high cost out of borough placements.
3. We aim to maintain and continue to embed our strategy of meeting SEND Support needs earlier through greater inclusion thus reducing unnecessary escalation to high-cost statutory processes.
 4. The additional funding enables us to maintain the contributions to the early intervention offers, including the Joint Communication Team, Autism Education Trust programme and Specialist Teacher services who are working to ensure mainstream schools have the requisite skills and resources to meet needs; ensuring all children, have the same pathway of opportunities available to them and are able to reach their full potential in our ruthless commitment to inclusion.

Report ends

Appendices

Appendix 1 – Disapplication Pro-Forma

Appendix 2 – Equalities Impact Assessment

Item 4 Appendix 1 - Schools Block to High Needs Block Disapplication Proforma

For the LA to complete

Local Authority Name	Hammersmith & Fulham
Funding year request relates to	2024/25
Type of disapplication	Schools Block Transfer
<i>If a block transfer - the % block transfer</i>	1%
<i>If a block transfer - cash value of the block transfer</i>	
Explanation for why the disapplication is required	<p>Proposing a 1% transfer, to address sustainability of the block.</p> <p>There are five key drivers that have led to the request:</p> <p>1) To address budget pressure from cost inflation since the Safety Valve agreement.</p> <p>2) Lower than originally forecast HNB funding increases now assumed than originally modelled per DfE advice During the Safety Valve negotiations we were asked to model a 8% increase across the 5 year Safety Valve profile. The DfE subsequently provided updated funding assumptions and in an email from the DfE Safety Valve Team on the 14 January 2022 we were asked to set out the impact as a result of the changes in assumptions and how this subsequently impacts on our ability to eliminate our deficit. The Council modelled the expenditure forecast to show the revised funding assumptions of a 5% increase in 2023/24 and 3% beyond that which have posed some considerable challenge. Following the ongoing work in embedding our updated finance modelling and the revised High Needs Block funding assumptions, we have undertaken significant work to ensure our expenditure is within our annual allocation. We have mitigated the movements to deliver in year balance positions, assuming approval of ongoing block transfers. The need to respond to the revised funding assumptions eliminates the Authority's flexibility which was modelled into the original Safety Valve action plan.</p> <p>3) Special MFG at 3% and Special Provision Supplementary Grant from 2023/24 Financial Year 3% had not been explicitly modelled for Special Schools in relation to MFG, nor was the additional grant for Special provision at 3.4% which effectively halved the increased funding that we received in overall terms and had not been factored into the original forecast.</p> <p>4) Maintains the continued investment of High Needs into H&F mainstream provision. Our transformation programme is centred around early identification and intervention; providing the capacity and resources to be able to meet need earlier and reduce escalation to high cost statutory processes. As such within our Safety Valve forecast we have profiled ongoing investment in these areas. The disapplication is required to create the headroom for the continued investment in these offers including the Joint Communication Team and Autism Education Trust, in the context of the broader pressures.</p> <p>5) Local area placement sufficiency The Council has undertaken a SEND Sufficiency Review to ensure the sufficiency of local education places over the medium to long term, reducing reliance on more costly out of borough placements. A key recommendation of the SEN Sufficiency Review is the creation of additional local provision, however it will take time for this provision to come on stream; during which time other efficiencies as well as the block transfer are required to mitigate this pressure.</p>

Engagement with the schools forum and consultation with the schools affected	
Has the schools forum been consulted?	Planned for October 2023 and November 2023
Does the schools forum agree with this request?	TBC
Has the schools forum voted?	Expected at extraordinary Schools Forum meeting November 2023
Which groups of representatives voted? (maintained schools, academies, etc)	TBC
What was the split in votes?	TBC
What was the date of the schools forum meeting? (DD/MM/YY)	Expected 14/11/2023 - subject to agreement
Was the meeting quorate?	TBC
Please provide link(s)/attach to the minutes showing schools forum agreement, or details of where this can be found in attached documentation.	TBC
If this has not yet been discussed with Schools forum, what date will this be? (DD/MM/YY)	03/10/23 and 14/11/23
Please provide supporting information and findings following consultation with local schools, including the views of those schools directly affected by the proposals	TBC
Detailed information that has not been included above	
Please provide any other detailed information you would like to include which has not been included above	

H&F Equality Impact Analysis Tool



Conducting an Equality Impact Analysis

An EIA is an improvement process which helps to determine whether our policies, practices, or new proposals will impact on, or affect different groups or communities. It enables officers to assess whether the impacts are positive, negative, or unlikely to have a significant impact on each of the protected characteristic groups.

The tool is informed by the [public sector equality duty](#) which came into force in April 2011. The duty highlights three areas in which public bodies must show compliance. It states that a public authority must, in the exercise of its functions, have due regard to the need to:

- 1. Eliminate discrimination, harassment, victimisation, and any other conduct that is prohibited under the Equality Act 2010**
- 2. Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it**
- 3. Foster good relations between persons who share a relevant protected characteristic and persons who do not share it**

Whilst working on your Equality Impact Assessment, you must analyse your proposal against these three tenets.

General points

1. In the case of matters such as service closures or reductions, considerable thought will need to be given to any potential equality impacts. Case law has established that due regard cannot be demonstrated after the decision has been taken. Your EIA should be considered at the outset and throughout the development of your proposal, it should demonstrably inform the decision, and be made available when the decision is recommended.
2. Wherever appropriate, the outcome of the EIA should be summarised in the Cabinet/Cabinet Member report and equalities issues dealt with and cross referenced as appropriate within the report.
3. Equalities duties are fertile ground for litigation and a failure to deal with them properly can result in considerable delay, expense, and reputational damage.
4. Where dealing with obvious equalities issues e.g. changing services to disabled people/children, take care not to lose sight of other less obvious issues for other protected groups.
5. If you already know that your decision is likely to be of high relevance to equality and/or be of high public interest, you should contact the Strategy & Communities team for support.

Further advice and guidance can be accessed online and on the intranet:

<https://www.gov.uk/government/publications/public-sector-equality-duty>

<https://officesharedservice.sharepoint.com/sites/Governance/SitePages/Reports.aspx>

H&F Equality Impact Analysis Tool

Overall Information	Details of Full Equality Impact Analysis
Financial Year and Quarter	2024/25
Name and details of policy, strategy, function, project, activity, or programme	Schools Block to High Needs Block Disapplication Request
Lead Officer	Name: Joe Gunning Position: Programme Lead, Children's Commissioning Email: joe.gunning@lbhf.gov.uk Telephone No: 07769672031
Date of completion of final EIA	03/11/2023

Page 19

Section 02	Scoping of Full EIA		
Plan for completion	Timing: N/A Resources: N/A		
Analyse the impact of the policy, strategy, function, project, activity, or programme	Analyse the impact of the policy on the protected characteristics (including where people / groups may appear in more than one protected characteristic). You should use this to determine whether the policy will have a positive, neutral, or negative impact on equality, giving due regard to relevance and proportionality.		
	Protected characteristic	Analysis	Impact: Positive, Negative, Neutral
	Age	This disapplication enables the continued investment in early identification and intervention offers to ensure every child and young person is supported to ensure their needs are effectively identified and met through a range of offers.	Positive
	Disability	Our approach embeds inclusive practice. Our early identification and intervention programme seeks to build capacity in mainstream settings to enable the delivery of differentiated curriculum to meet the diverse range of needs at	Positive

	SEN Support, whilst ensuring there is sufficient specialist provision for the small number of children and young people who require it. This inclusive approach is in line with what young people tell us they want from our services.	
Gender reassignment	There is no anticipated impact in relation to gender reassignment	Neutral
Marriage and Civil Partnership	There is no anticipated impact in relation to marriage and civil partnership	Neutral
Pregnancy and maternity	There is no anticipated impact in relation pregnancy and maternity	Neutral
Race	The procurement aims to address disproportionality and for services to be fully inclusive. Services commit to value and demonstrate respect for diversity, and to reach into communities to deliver support in the right way for all children and young people to encourage greater engagement. Services are available for all settings across the whole borough with flexibility to address locally emerging needs and hotspot areas, this includes supporting specific children and young people where a need arises.	Positive
Religion/belief (including non-belief)	There is no anticipated impact in relation to religion/belief these services are open to people of all faiths and of no faith.	Neutral
Sex	There is no anticipated impact in relation to sex.	Neutral
Sexual Orientation	There is no anticipated impact in relation to sexual orientation.	Neutral

Human Rights or Children's Rights

If your decision has the potential to affect Human Rights or Children's Rights, please contact your Equality Lead for advice

Will it affect Human Rights, as defined by the Human Rights Act 1998?

No

Will it affect Children's Rights, as defined by the UNCRC (1992)?

No

Section 03	Analysis of relevant data Examples of data can range from census data to customer satisfaction surveys. Data should involve specialist data and information and where possible, be disaggregated by different equality strands.
Documents and data reviewed	Data reviewed includes census data and SEN2 as well as feedback from children, young people and families at both national and local level. In terms of the impact on the school community as a result of this transfer, we have considered this impact and are repositioning this funding for the benefit of H&F school community as a whole. Although coming out of the mainstream funding, the funding will be going back into schools via the High Needs Block to provide overall enrichment.
New research	N/A

Section 04	Consultation
Consultation	In line with the H&F priority of doing things with residents not to them, we continue to coproduce our programmes of work with all stakeholders including children, young people and their families. Schools Forum are updated quarterly in relation to the High Needs Block pressures and have approved the block transfer. All settings have been consulted as part of this proposal and their views have been considered. We will continue to work closely with settings in the implementation of the agreed programmes.
Analysis of consultation outcomes	The consultation was completed by X primary schools of which X are maintained and X are academies. The response rate was X%. There are no objections to the suggested proposals.

Section 05	Analysis of impact and outcomes
Analysis	The consultation did not raise any comments in relation to protected characteristics.


Section 06	Reducing any adverse impacts and recommendations
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Outcome of Analysis	The feedback received did not identify any adverse impacts and therefore no changes have been made in this regard
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Section 07	Action Plan					
Action Plan	Note: You will only need to use this section if you have identified actions as a result of your analysis					
	Issue identified	Action (s) to be taken	When	Lead officer and department	Expected outcome	Date added to business/service plan
	N/A	N/A	N/A	N/A	N/A	N/A

Section 08	Agreement, publication and monitoring					
Senior Managers' sign-off	Name: Peter Haylock Position: Operations Director Education and SEND Email: Peter Haylock Telephone No: 07341672995					
Key Decision Report (if relevant)	Date of report to Cabinet Member: Key equalities issues have been included: No equalities issues identified.					
Equalities Advice (where involved)	Name: N/A Position: N/A Date advice / guidance given: N/A Email: N/A Telephone No: N/A					

Item 5

	<p>London Borough of Hammersmith & Fulham</p> <p>SCHOOLS FORUM</p> <p>November 2023</p>
<p>Schools Block Mainstream Budget 2024/25 Update</p>	
<p>Open</p>	
<p>Classification - For Information</p>	
<p>Key Decision: No</p>	
<p>Wards Affected: (All Wards): All</p>	
<p>Accountable Director: Jacqui McShannon, Strategic Director of Children’s Services</p>	
<p>Report Authors: Peter Haylock – Operational Director of Education and SEND Tony Burton – Head of Finance Children’s Services and Education</p>	
<p>Purpose of the report This report sets out the updated provisional modelling for mainstream school budget shares 2024/25 following the funding allocation correction notified by the Department for Education in October 2023.</p> <p>This item will also cover verbal feedback on the budget consultation which was relaunched with the revised provisional modelling with a revised consultation end date of Friday 10th November 2023.</p>	

Recommendations:

1. Schools Forum to note:
 - a. Revised funding allocation 2024/25 £119.542m
 - b. Revisions to the modelling and impact on affordability resulting from the revised funding reduction – see Appendix 1
 - c. Revised consultation launched week commencing 30th October 2023 and ending 10th November 2023 – see Appendix 2 and 3
 - d. Three budget information sessions held 1st, 2nd and 7th November – see slide deck appendix 4
 - e. Further information with respect to the following to be shared with schools ahead of Schools Forum budget decisions 16th January 2024:
 - i. provisional De delegated and Statutory Education Functions budget detail with school level deductions 2024/25 (maintained schools only)
 - ii. a clearly identified but notional SEN budget within their overall budget allocations (all mainstream maintained schools and academies)

Context

2. On Friday 6th October 2023, the Department for Education (DfE) sent a notification to all local authorities. The DfE uncovered an error made by DfE officials during the initial calculations of the National Funding Formula (NFF). Specifically, there was an error processing forecast pupil numbers, which means that the overall cost of the core schools budget would be 0.62% greater than allocated. The department apologies for their error and are conducting a formal review of the quality assurance process surrounding the calculation of the NFF, with independent scrutiny and to identify improvements to ensure similar mistakes are not repeated in the future.
3. The revised allocation shows that the amended figure calculated through the NFF for H&F is £0.5m lower than the provisional allocation notified to us in July 2023. The Education and Skills Funding Agency provided an updated Authority Proforma tool with revised national funding formula rates in October and officers have used the tool to remodel the provisional budget and provisional budget allocations to schools.
4. The consultation for the 2024/25 schools block budget was put on hold and relaunched in week commencing the 30th October 2023 with revised provisional budget modelling. The consultation is due to end on 10th November. A verbal update will be provided to Schools Forum on the consultation responses from schools and in particular with respect to responses on the proposed Schools to High Needs block transfer of 1%.

Updated Modelling on Revised 2024/25 Funding Allocation

5. Table 1 details the provisional allocation for 2024/25 (before growth) notified in October 2023 compared with the equivalent 2023/24 baseline. The allocation before growth has increased by £0.737m or 0.62%. This is an adverse position on the 2024/25 funding allocation notified in July 2023 of an increase of £1.235m or 1.04%.

Table 1 Schools Block Funding Allocation Year on Year

	2023/24	2024/25	£ increase	% increase
Schools Block Baseline (excludes growth funding)	£114.940m	£115.677m		
MSAG – included in baseline	£3.865m	£3.865m		
Revised baseline	£118.805m	£119.542m	£0.737m	0.62%

6. The revised modelling for 2024/25 uses the ESFA's revised Authority Proforma Tool (APT) and operational guidance to model two affordable budget

allocation models for 2024/25 based on the initial allocation which excludes growth and is based on the October 2022 census.

7. It should be noted that the models provided are to illustrate the impact on allocations from changing key variables allowed within the NFF in 2024/25:
 - NFF values after area cost adjustment for inner London
 - Factor rates uplifted by a percentage across all factor rates in so far this is affordable within each model to ensure all funding is allocated.
 - Minimum Funding Guarantee (MFG) set within the required level by the NFF
 - This is the minimum increase in funding through pupil led funding factors year on year
 - The MFG must be set between an increase of 0% and 0.5% for 2024/25
8. Two models are provided to understand the impact across schools from local discretion afforded within the NFF when setting MFG at the lower and upper limit of 0% and 0.5% respectively.
 - Model 1 – Minimum Funding Guarantee on pupil led factors set at the maximum affordable level up to the limit of 0.5%
 - Note that MFG at 0.5% is unaffordable with the revised and reduced funding allocation. **Note: at the revised provisional allocation the maximum affordable MFG is 0.25%.**
 - Mirrors the NFF factor rates after area cost adjustment for inner London. Note that no uplift on national rates is affordable within Model 1 following the revised and reduced allocation.
 - Resulting total MFG deployment is £2.714m
 - Model 2 – Minimum Funding Guarantee on pupil led factors set at 0.0%
 - Mirrors the NFF factor rates and allows for 1.12% uplift on inner London NFF rates
 - Resulting total MFG deployment is £1.432m
9. Please note that Model 1 and the principles contained in Appendix 3 continue to be the recommended model for 2024/25. i.e. maximise MFG up to 0.5% before increasing factor rates above NFF rates after area cost adjustment.
10. Each model assumes continuing support to the High Needs Block through a 1% transfer from the Schools Block.
 - Continues the level of block transfer agreed by Schools Forum and the Minister of State for the 2023/24 budget.
 - The value of the block transfer on the provisional budget is £1.182m.
 - A disapplication above a level of 0.5% requires Schools Forum approval and a disapplication to the Minister of State.
 - The continued disapplication is required for the short to medium term sustainability of the High Needs Block.
11. The options that have been modelled are all compliant with the guidelines set by the DfE. There is limited scope to suggest different options within the guidelines as the resulting changes to funding are marginal.

12. The updated APT will be issued in December 2023 populated with the October 2023 census and including growth/falling rolls funding. The growth/falling rolls funding and final census may enable greater flexibility in the model to increase the factor rates further above the NFF ACA level.
13. Financial illustrations are based on October 2022 pupil data and are therefore indicative only pending final modelling following confirmation of the October 2023 census data.

Report ends

Appendices

- Appendix 1 – Revised provisional modelling and school level allocations
- Appendix 2 – Revised Consultation document
- Appendix 3 – Explanation of Key Principles with respect to Minimum Funding Guarantee and NFF Factor Rate uplift
- Appendix 4 – Budget workshops November 2023 Slide Deck

Revised Factor Rate Modelling for 2024/25 - November Schools Forum

	23-24 Final Factors	Model 1 24-25	Model 2 24-25			
Rate Uplift if applicable	A 2.50%	0.00%	1.12%			
MFG	0.50%	0.25%	0.00%			
Basic/pupil funding	2023/24 NFF Weighted & Uplifted MAX MFG w Falling Rolls	2024/25 HARD NFF ACA Weighted w Uplift - MAX MFG	23/24 H&F Units vs 24/25 Model 011 B1-A	2024/25 HARD NFF ACA Weighted w Uplift - MIN MFG	23/24 H&F Unit vs 24/25 Model 022 C1-A	NFF Unit Values 24-25 from NFF for Schools and HN 24-25
AWPU						
Primary AWPU	4,119.89	4,226.88	106.99	4,274.28	154.40	£3,562
KS3 AWPU	5,808.39	5,959.41	151.02	6,026.24	217.85	£5,022
KS4 AWPU	6,546.43	6,717.68	171.25	6,793.01	246.58	£5,661
Additional Needs Funding						
Deprivation						
Primary FSM	570.68	581.46	10.78	587.98	17.30	£490
Secondary FSM	570.68	581.46	10.78	587.98	17.30	£490
Primary FSM6	855.78	973.06	117.28	983.97	128.19	£820
Secondary FSM6	1,250.29	1,423.99	173.70	1,439.96	189.67	£1,200
Primary IDACI A	813.30	806.93	-6.37	815.98	2.68	£680
Primary IDACI B	619.08	611.13	-7.95	617.98	-1.09	£515
Primary IDACI C	582.66	575.53	-7.13	581.98	-0.67	£485
Primary IDACI D	534.07	528.06	-6.01	533.98	-0.09	£445
Primary IDACI E	339.89	338.20	-1.69	341.99	2.11	£285
Primary IDACI F	279.19	278.87	-0.32	282.00	2.81	£235
Secondary IDACI A	1,128.91	1,121.39	-7.52	1,133.97	5.06	£945
Secondary IDACI B	886.13	878.13	-8.00	887.98	1.85	£740
Secondary IDACI C	825.44	818.80	-6.64	827.98	2.54	£690
Secondary IDACI D	752.60	747.60	-5.00	755.98	3.38	£630
Secondary IDACI E	540.17	534.00	-6.17	539.99	-0.19	£450
Secondary IDACI F	406.65	403.46	-3.19	407.98	1.33	£340
Low Prior Attainment						
Primary LPA	1,402.02	1,388.39	-13.63	1,403.96	1.94	£1,170
Secondary LPA	2,124.28	2,106.32	-17.96	2,129.94	5.66	£1,775
EAL						
Primary EAL	704.04	700.13	-3.91	707.98	3.94	£590
Secondary EAL	1,899.71	1,880.86	-18.85	1,901.95	2.24	£1,585
Mobility						
Primary Mobility	1,147.11	1,139.19	-7.92	1,151.96	4.85	£960
Secondary Mobility	1,650.87	1,637.59	-13.28	1,655.95	5.09	£1,380
Looked After Children	-	-		-		£0
School Led Funding						
Lump Sum						
Primary lump sum	155,375.92	159,487.10	4,111.18	161,275.59	5,899.67	£134,400
Secondary lump sum	155,375.92	159,487.10	4,111.18	161,275.59	5,899.67	£134,400
Sparsity						
Primary sparsity	66,936.20	67,758.29	822.09	68,518.13	1,581.93	57,100
Secondary sparsity	97,372.55	98,492.78	1,120.23	99,597.28	2,224.73	83,000
Middle-school sparsity	97,372.55	98,492.78	1,120.23	99,597.28	2,224.73	83,000
All-through sparsity	97,372.55	98,492.78	1,120.23	99,597.28	2,224.73	83,000
Premises						
Split sites basic eligibility funding	-	63,723.64	63,723.64	64,438.24	64,438.24	-
Split sites distance funding	-	31,921.15	31,921.15	32,279.12	32,279.12	-
Difference between funding allocated and the available funding post-HNB transfer	-£613	-£302		-£45		
Transfer to HNB - Value	£1,154,400	£1,182,695		£1,182,695		
Transfer to HNB - % of SB	1.00%	1.00%		1.00%		

Revised Modelling of Deployment between Factors 2024-25 November Schools Forum

School Block Allocation		£115,508,117.00	£119,542,173.00	£119,542,173.00
		23-24 Final Factors	Model 1 24-25	Model 2 24-25
Rate Uplift if applicable		2.50%	0.00%	1.12%
MFG		0.50%	0.25%	0.00%
AWPU	Primary (Years R-6)	£36,502,182.68	£37,492,425.60	£37,912,865.66
	Key Stage 3 (Years 7-9)	£26,033,189.70	£26,710,075.62	£27,009,602.41
	Key Stage 4 (Years 10-11)	£19,580,369.84	£20,092,580.88	£20,317,899.08
Total AWPU		£82,115,742.22	£84,295,082.10	£85,240,367.15
Deprivation	FSM	£2,647,955.20	£2,700,236.28	£2,730,516.73
	FSM6	£5,549,261.31	£6,319,245.89	£6,390,109.91
	IDACI Band F	£585,916.59	£583,797.85	£590,344.55
	IDACI Band E	£1,272,686.91	£1,262,467.12	£1,276,624.43
	IDACI Band D	£977,190.91	£968,264.07	£979,122.18
	IDACI Band C	£1,338,348.85	£1,327,226.70	£1,342,110.22
	IDACI Band B	£883,454.14	£875,259.57	£885,074.73
	IDACI Band A	£187,275.62	£186,935.18	£189,031.47
Total Deprivation		£13,442,089.54	£14,223,432.65	£14,382,934.22
Looked After Children (LAC)		£0.00	£0.00	£0.00
EAL 3 Primary		£1,622,885.57	£1,614,724.19	£1,632,831.70
EAL 3 Secondary		£907,224.66	£898,220.93	£908,293.58
Mobility		£298,956.21	£297,337.44	£300,671.79
		£2,829,066.44	£2,810,282.56	£2,841,797.07
LPA	Primary	£3,415,864.11	£3,387,718.19	£3,425,708.00
	Secondary	£2,271,310.52	£2,252,107.20	£2,277,362.00
Total Low Prior Attainment		£5,687,174.63	£5,639,825.39	£5,703,070.00
Lump sum		£7,302,668.46	£7,336,406.78	£7,418,677.25
Funding through MFG		£1,486,403.72	£2,714,354.00	£1,432,042.00
Other Items				
	HNB Transfer	£1,154,400.00	£1,182,695.26	£1,182,695.26
	Falling Rolls	£200,000.00	£0.00	£0.00
	Split Sites	£17,312.00	£67,145.29	£67,898.25
	Rates	£1,272,646.78	£1,272,646.78	£1,272,646.78
	Sparsity	£0.00	£0.00	£0.00
Grand Total		£115,507,503.78	£119,541,870.81	£119,542,127.98

Revised Model Comparison - 2024-2025 By School

All models assume an HNB Transfer of 1%

Status/ Phase	Primary/Sec ondary	Primary Quartile	Seconda ry Quartile	URN	LAESTAB	School Name	Factor uplift 2.50%					Factor uplift 0.00%		Factor uplift 1.12%			
							MFG					Pupil Numbers	Model 1 24-25		Model 2 24-25		
							0.50%						0.25%		0.00%		
							23-24 Post MFG per pupil Budget	23-24 Post MFG Budget Before MSAG Adj	MSAG 23-24	23-24 Post MFG Budget Including MSAG	23-24 Post MFG per pupil Budget including		NOR 23-24	NOR 24-25 Pre-Census	FINAL 24-25 Post MFG per pupil Budget	FINAL 24-25 Post MFG Budget	FINAL 24-25 Post MFG per pupil Budget
Total							£114,153,104	£3,865,040	£118,018,144		16,333	16,343		£118,359,175.67		£118,359,433.10	
MP	Primary			100321	2052002	Addison Primary School	£6,612	£1,481,156	£47,564	£1,528,720	£6,825	224	224	£6,841.23	£1,532,434.75	£6,852.95	£1,535,060.76
MP	Primary			100322	2052026	Avonmore Primary School	£6,666	£1,233,176	£41,181	£1,274,357	£6,888	185	185	£6,902.79	£1,277,016.18	£6,916.15	£1,279,488.26
MP	Primary			100324	2052061	Brackenbury Primary School	£6,414	£2,168,058	£70,617	£2,238,675	£6,623	338	338	£6,638.34	£2,243,760.27	£6,649.87	£2,247,655.45
MP	Primary			100326	2052134	Miles Coverdale Primary School	£6,731	£1,359,658	£45,317	£1,404,975	£6,955	202	202	£6,970.01	£1,407,941.95	£6,983.32	£1,410,629.91
MP	Primary			100328	2052223	Flora Gardens Primary School	£6,891	£1,116,274	£38,174	£1,154,448	£7,126	162	162	£7,140.74	£1,156,800.52	£7,126.22	£1,154,447.79
MP	Primary			100331	2052350	Kenmont Primary School	£6,826	£1,167,285	£38,087	£1,205,372	£7,049	171	171	£7,063.49	£1,207,857.24	£7,077.09	£1,210,183.24
MP	Primary			100334	2052408	Melcombe Primary School	£6,910	£1,195,407	£39,854	£1,235,261	£7,140	173	173	£7,154.78	£1,237,777.11	£7,168.54	£1,240,157.85
MP	Primary			100335	2052444	Old Oak Primary School	£7,075	£1,308,962	£40,686	£1,349,648	£7,295	185	185	£7,311.81	£1,352,684.84	£7,296.73	£1,349,895.16
MP	Primary			100338	2052555	Sir John Lillie Primary School	£6,863	£1,557,913	£53,305	£1,611,218	£7,098	227	227	£7,115.72	£1,615,267.79	£7,130.25	£1,618,566.17
MP	Primary			100340	2052632	Wendell Park Primary School	£5,959	£1,954,593	£61,783	£2,016,376	£6,147	328	328	£6,161.04	£2,020,822.09	£6,170.37	£2,023,880.41
MP	Primary			100341	2052660	Wormholt Park Primary School	£6,894	£2,240,689	£74,342	£2,315,031	£7,123	325	325	£7,139.44	£2,320,317.30	£7,152.69	£2,324,622.73
MP	Primary			100344	2053300	All Saints CoE Primary School	£5,749	£1,075,107	£34,044	£1,109,151	£5,931	187	187	£5,944.40	£1,111,603.24	£5,951.31	£1,112,894.74
MP	Primary			100345	2053354	Holy Cross RC School	£5,762	£3,220,989	£93,105	£3,314,089	£5,929	559	559	£5,942.46	£3,321,834.15	£5,928.60	£3,314,089.01
MP	Primary			100346	2053368	John Betts Primary School	£5,621	£1,169,141	£38,623	£1,207,764	£5,807	208	208	£5,818.93	£1,210,337.34	£5,806.56	£1,207,764.53
MP	Primary			100349	2053463	St Johns Walham Green Church of	£5,477	£1,823,738	£61,625	£1,885,363	£5,662	333	333	£5,675.17	£1,889,830.38	£5,673.43	£1,889,253.00
MP	Primary			100350	2053529	St Mary's Catholic Primary School	£6,743	£1,038,362	£37,166	£1,075,528	£6,984	154	154	£6,998.53	£1,077,773.05	£7,014.05	£1,080,163.01
MP	Primary			100351	2053566	St Paul's CoE Primary School	£6,803	£1,224,487	£38,124	£1,262,611	£7,015	180	180	£7,031.60	£1,265,688.71	£7,042.82	£1,267,706.80
MP	Primary			100352	2053578	St Peter's Primary School	£5,700	£1,162,853	£36,944	£1,199,797	£5,881	204	204	£5,951.76	£1,214,159.04	£6,018.37	£1,227,747.34
MP	Primary			100353	2053600	St Stephen's CoE Primary School	£5,472	£2,287,463	£70,560	£2,358,023	£5,641	418	418	£5,655.01	£2,363,795.61	£5,642.09	£2,358,393.73
MP	Primary			100354	2053602	Good Shepherd RC Primary School	£5,805	£1,178,428	£37,916	£1,216,344	£5,992	203	203	£6,004.60	£1,218,932.88	£5,991.84	£1,216,343.42
MP	Primary			100357	2053648	St Thomas of Canterbury Catholic	£6,542	£863,498	£29,973	£893,471	£6,769	132	132	£6,784.22	£895,517.07	£6,797.43	£897,260.58
MP	Primary			134009	2053649	Larmerier & Sacred Heart Catholic	£5,395	£2,206,756	£70,894	£2,277,650	£5,569	409	409	£5,581.48	£2,282,826.50	£5,568.83	£2,277,649.85
MP	Primary			134273	2053650	Normand Croft Community School	£9,008	£1,657,444	£46,232	£1,703,676	£9,259	184	184	£9,282.45	£1,707,971.16	£9,262.47	£1,704,294.61
AcaP	Primary			137331	2052000	Ark Conway Primary Academy	£6,189	£1,262,569	£44,363	£1,306,932	£6,407	204	204	£6,420.25	£1,309,731.47	£6,431.92	£1,312,112.27
AcaP	Primary			139546	2052001	West London Free School Primary	£5,649	£2,350,089	£76,759	£2,426,848	£5,834	416	416	£5,847.30	£2,432,475.84	£5,856.09	£2,436,132.37
AcaP	Primary			139820	2052003	Ark White City Academy	£6,957	£1,203,628	£40,843	£1,244,471	£7,193	173	323	£6,629.02	£2,141,174.35	£6,609.25	£2,134,787.80
AcaP	Primary			140811	2052004	Earl's Court Free School Primary	£5,955	£1,232,644	£40,831	£1,273,475	£6,152	207	207	£6,165.29	£1,276,215.55	£6,174.78	£1,278,178.96
AcaP	Primary			141685	2052005	Langford Primary School	£6,411	£1,609,113	£51,931	£1,661,044	£6,618	251	251	£6,633.63	£1,665,040.59	£6,618.97	£1,661,362.35
AcaP	Primary			138680	2052045	Ark Bentworth Primary Academy	£6,659	£1,138,750	£40,560	£1,179,310	£6,897	171	171	£6,911.14	£1,181,804.52	£6,926.30	£1,184,398.03
AcaP	Primary			143213	2052286	Fulham Primary School	£6,614	£1,541,116	£51,672	£1,592,788	£6,836	233	233	£6,852.67	£1,596,671.00	£6,865.58	£1,599,680.35
AcaP	Primary			142256	2052309	Thomas's Academy	£6,381	£1,244,202	£39,133	£1,283,335	£6,581	195	195	£6,597.21	£1,286,455.00	£6,592.35	£1,285,507.55
AcaP	Primary			143212	2052484	Queen's Manor School and Special	£6,253	£1,294,421	£42,067	£1,336,488	£6,456	207	207	£6,470.37	£1,339,365.87	£6,480.35	£1,341,431.88
AcaP	Primary			143214	2052577	Sulivan Primary School	£6,611	£1,137,029	£39,094	£1,176,123	£6,838	172	172	£6,853.08	£1,178,729.26	£6,865.38	£1,180,844.78
AcaP	Primary			141902	2052913	Greenside Primary School	£6,266	£1,265,742	£41,360	£1,307,102	£6,471	202	202	£6,485.32	£1,310,033.94	£6,471.42	£1,307,226.12
AcaP	Primary			100347	2053378	St Augustine's RC Primary School	£5,944	£1,200,783	£39,629	£1,240,412	£6,141	202	202	£6,154.40	£1,243,187.95	£6,160.48	£1,244,417.46
AcaP	Primary			100355	2053645	Saint John Southworth	£6,207	£1,967,482	£64,926	£2,032,408	£6,411	317	317	£6,426.67	£2,037,255.11	£6,412.16	£2,032,654.55
AcaS	Secondary			136750	2054000	West London Free School	£7,551	£4,908,333	£171,575	£5,079,908	£7,815	650	650	£7,834.84	£5,092,645.45	£7,816.44	£5,080,685.36
AcaS	Secondary			141135	2054001	The Fulham Boys School	£7,578	£4,736,170	£168,983	£4,905,153	£7,848	625	625	£7,867.04	£4,916,903.01	£7,871.51	£4,919,693.24
AcaS	Secondary			141617	2054002	The Hurlingham Academy	£8,333	£5,774,653	£203,151	£5,977,804	£8,626	693	693	£8,647.35	£5,992,613.46	£8,626.76	£5,978,344.87
AcaS	Secondary			143129	2054004	Phoenix Academy	£9,145	£4,590,827	£158,778	£4,749,605	£9,461	502	502	£9,483.65	£4,760,792.26	£9,461.36	£4,749,603.96
AcaS	Secondary			139364	2054106	Fulham Cross Academy	£8,670	£3,771,300	£131,316	£3,902,616	£8,972	435	435	£8,993.48	£3,912,162.64	£8,972.43	£3,903,008.28
AcaS	Secondary			139365	2054315	Fulham Cross Girls' School and Lar	£8,241	£4,985,737	£179,579	£5,165,316	£8,538	605	605	£8,558.98	£5,178,180.56	£8,571.14	£5,185,539.73
AcaS	Secondary			137935	2054620	Sacred Heart High School	£7,289	£7,157,728	£244,625	£7,402,353	£7,538	982	982	£7,556.40	£7,420,385.54	£7,538.32	£7,402,632.62
AcaS	Secondary			138607	2054632	Lady Margaret School	£7,169	£4,294,302	£146,517	£4,440,819	£7,414	599	599	£7,432.32	£4,451,960.01	£7,414.79	£4,441,461.04
AcaS	Secondary			137157	2055400	The London Oratory School	£6,961	£6,912,341	£228,462	£7,140,803	£7,191	993	993	£7,209.77	£7,159,302.79	£7,192.26	£7,141,910.37
AcaS	Secondary			136172	2056906	Hammersmith Academy	£8,063	£5,756,758	£214,049	£5,970,807	£8,362	714	714	£8,384.77	£5,986,726.70	£8,376.27	£5,980,653.51
AcaS	Secondary			131752	2056905	Ark Burlington Danes Academy	£7,971	£7,125,956	£258,721	£7,384,677	£8,260	894	754	£8,695.51	£6,556,413.64	£8,791.80	£6,629,017.33

2024/25 Schools Block Budget
Consultation
Revised Week Commencing 30th
October 2023

**Funding arrangements for the Schools
Block Budget Shares 2024/25
(Mainstream Schools Reception to
Year 11)**

30th October 2023

Contents

- 1. Note on the Changes to Schools Budget Modelling and Consultation Since 3rd October 2023**
- 2. Introduction to Budget and Context**
- 3. Schools Budget - An Overview**
- 4. Schools Block – Provisional Modelling for 2023/24 Schools Block Budget Shares for Mainstream Schools**
- 5. Falling Rolls Fund**
- 6. Maintained Schools - De-delegated Functions Budgets and Education Functions (maintained only)**
- 7. Notional SEN Review Work Autumn 2023**
- 8. 2023/24 School Budget Consultation Questions for Feedback**

- 1. Note on the Changes to Schools Budget Modelling and Consultation Since 3rd October 2023**
- 1.1. This document has been revised since Schools Forum on 3rd October 2023 and following the launch of this budget consultation on that date. This is to reflect the changes to the Schools Block allocations notified to Local Authorities by the Department for Education on 6th October.
- 1.2. On Friday 6th October 2023, the Department for Education (DfE) sent a notification to all local authorities. The DfE has uncovered an error made by DfE officials during the initial calculations of the National Funding Formula (NFF).
- 1.3. Specifically, there was an error processing forecast pupil numbers, which means that the overall cost of the core schools budget would be 0.62% greater than allocated. The department apologises for their error. They are conducting a formal review of the quality assurance process surrounding the calculation of the NFF, with independent security and to identify improvements to ensure similar mistakes are not repeated in the future.
- 1.4. The revised allocation shows that the amended figure calculated through the NFF for H&F is £0.5m lower than the provisional allocation notified to us in July 2023.
- 1.5. The modelling for 24/25 budget has been revised and revised schedules and supporting information has been sent to schools with this document to support the consultation process, and ahead of publication for Schools Forum on Tuesday 14th November.
- 1.6. The original consultation workshops planned have been rescheduled from 1st November 2023. Please see details below.
- 1.7. Further information will be provided over the course of the Autumn Term following this consultation:
 - Details of the delegated and Statutory Education functions budgets (for maintained schools only)
 - H&F will undertake an exercise to do a detailed analysis and review of the 2024/25 notional SEN budget in advance of the Schools Forum meeting scheduled for 16th January 2024. Originally it was intended to bring this to Schools Forum in November, however the work to remodel the schools budget has taken precedence.
- 1.8. This relaunched consultation will run until Friday 10th November 2023 to allow schools on half term break week commencing 30th October sufficient time to consider the proposals.
- 1.9. The updated modelling will be presented to Schools Forum on 14th November 2023 together with the feedback from schools on this consultation and the formal block movement request from Schools Block to High Needs Block proposed.

2. Introduction to the budget and Context

- 2.1.** This consultation document sets out proposals for the Schools Block of the Dedicated Schools Grant (DSG) for the period April 2024 to March 2025.
- 2.2.** This consultation relates to the funding of mainstream maintained schools, academies and free schools from April 2024 to March 2025 following discussion at the Hammersmith and Fulham Schools Forum held on 3rd October 2023 and the revised funding allocations received since the original launch of this consultation process.
- 2.3.** The consultation does not cover the funding arrangements for maintained nursery schools or special schools as the funding for these schools comes from the Early Years and High Needs Blocks of the Dedicated Schools Grant.
- 2.4.** Copies of this document will be sent to School Business Managers and Finance Directors and are available on the Learning Partnership website and will be publicised through SchoolZone and Governors' Hub.
- 2.5.** All financial information and modelling contained in this document is with respect to provisional budgets notified to Hammersmith and Fulham by the Department for Education (DFE) and The Education Skills Funding Agency (ESFA) in October 2023. This is subject to further change following confirmation of the Autumn 2023 pupil census and final allocations from the ESFA expected to be announced in late December 2023.
- 2.6.** The final allocations could result in increased funding with respect to growth or falling rolls funding allocations. This will impact the final allocations in line with the principles of the budget set out in this document.
- 2.7.** Revised financial illustrations will be taken to Schools Forum on 14th November and are based on October 2022 pupil data and are therefore indicative only pending final modelling following confirmation of the October 2023 census data.

The reports discussed at Schools Forum on 3rd October can be found here.
[Agenda for Schools Forum on Tuesday, 3rd October, 2023, 2.00 pm | LBHF](#)

- 2.8.** You are invited to comment and feedback on the proposals by completing the survey on the link below in relation to consultation questions detailed in Section 7 of this document.

<https://forms.office.com/e/7edzVRG52s>

- 2.9.** The relaunched consultation period will run from Wednesday 1st November 2023 to Friday 10th November 2023. A link to the consultation survey will be sent by email to all Head Teachers on the 1st November 2023 and should be completed by close of business on Friday 10th November 2023. If you do not

receive the consultation link please contact the Education Finance Team (edufinance@lbhf.gov.uk).

We would be grateful if schools could coordinate their responses between interested parties and return only one response per school.

- 2.10. Consultation responses will be collated and reported to Hammersmith and Fulham Schools Forum in the week commencing 14th November 2023 so that key decisions can be made in line with Department for Education deadlines.
- 2.11. The education finance team expect to receive the final 2024/25 schools block allocations in late December 2023. The budget models will be reworked during the Christmas/New Year break and final proposals prepared for the Schools Forum planned for Tuesday 16th January 2024, where final schools budget allocations for 2024/25 will be agreed.
- 2.12. Please note that this consultation does not cover proposed updates to The Scheme for Financing Schools or the Financial Procedures Manual for maintained schools. This will follow later in the academic year.
- 2.13. Three virtual workshops are scheduled for the following dates. Places can be booked via the Learning Partnership website or via the links below:

Wednesday 1st November – Midday to 1:30pm:

[Schools Block Mainstream Budget Consultation Workshop 2024/25 - Learning Partnership \(lbhflearningpartnership.com\)](https://www.lbhflearningpartnership.com/schools-block-mainstream-budget-consultation-workshop-2024-25)

Thursday 2nd November – Morning 8:30am to 10am:

[Schools Block Mainstream Budget Consultation Workshop 2024/25 - Learning Partnership \(lbhflearningpartnership.com\)](https://www.lbhflearningpartnership.com/schools-block-mainstream-budget-consultation-workshop-2024-25)

Tuesday 7th November 5pm to 6:30pm:

[Schools Block Mainstream Budget Consultation Workshop 2024/25 - Learning Partnership \(lbhflearningpartnership.com\)](https://www.lbhflearningpartnership.com/schools-block-mainstream-budget-consultation-workshop-2024-25)

- 2.14. A further School Budget Update virtual briefing will be scheduled in January to provide schools with the final recommendations in advance of Schools Forum on the 16th January 2024.

3. Schools Budget - An Overview

- 3.1.** The Government implemented the first phase of the School Funding Reforms in 2013/14 aimed at providing a fairer, more consistent, and transparent national funding system.
- 3.2.** The DSG was frozen at the level received by individual local authorities (LAs) in 2012/13 and notionally separated into three blocks:
 - Schools Block – pupils aged 5 to 15 - restricted local proxy factors used in formula
 - Early Years Block – subject to eligibility, free nursery education for ages 2 to 4
 - High Needs Block – for pupils aged 0-25 with an Education Health Care Plan to meet additional need above the level schools and institutions are expected to provide from their funding under the Schools and Early Years blocks.
- 3.3.** The financial year 2023/24 was the first year of transition to the direct schools National Funding Formula (NFF). The aim being to have a system in which full fairness and consistency in funding is applied to ensure that every mainstream school in England is funded through the same national funding formula without adjustment through local funding formulae.
- 3.4.** In 2024/25, local authorities will remain responsible for determining final budget allocations to schools, in consultation with the Schools Forum and Schools.
- 3.5.** The DfE will continue to move forward with its plans to implement a direct NFF whereby funding will be allocated directly to schools based on a single, national formula. They are taking a gradual approach to transition to avoid any unnecessary or unexpected disruption to schools,
- 3.6.** The ESFA will continue with the same approach to tightening the NFF in 2024/25. As in 2023/24, local authorities will only be allowed to use NFF factors in their local formulae and must use all NFF factors except any locally determined premises factors. Local authorities will also be required to move their local formulae factors 10% closer to the NFF values unless they are already mirroring the NFF.
- 3.7.** The split sites factor is being allocated on a formulaic basis in the 2024/25 NFF. This represents a change to 2023/24 where locally determined split sites factors were used. This factor targets extra funding to schools which operate across more than one site.

Mainstream schools additional grant (MSAG)

- 3.8.** The mainstream schools additional grant (MSAG) was introduced in 2023/24 as a separate grant. Schools had flexibility over how the additional grant funding could be used to support their pupils. This grant funding is being rolled into the schools NFF from 2024/25. This is to ensure that the additional funding that schools attract through the NFF is as close as possible to the funding they would have received if the funding was continuing as a separate grant in 2024/25 without adding significant complexity to the formula.
- 3.9.** The rolling in of the MSAG into the NFF allocations will affect the core budgets that maintained schools will receive from April 2024 and that academies will receive from September 2024. To avoid an unfair gap in the support provided to academies, academies will continue to receive separate grant payments up until the end of August 2024. At this stage, MSAG will cease to operate as a separate grant.
- 3.10.** The value of the adjustment by rolling the MSAG into the NFF is £3.8m.

2024/25 NFF provisional allocations

- 3.11.** The revised provisional allocation of the Schools Block of the Dedicated Schools Grant for 2024/25 has been received from the ESFA at £119.542m after the October 2023 DfE error correction and based on October 2022 census numbers.
- 3.12.** This allocation excludes growth/falling rolls funding which will be announced in December 2023 in the final allocation. The Schools Block final allocation for 2024/25 may also increase or decrease dependent on the October 2023 census returns.
- 3.13.** Table 1 details the change in the provisional allocation for 2024/25 (before growth) notified in October 2023 compared with the equivalent 2023/24 baseline. The allocation before growth has increased by £0.737m or 0.62%.

Table 1 Schools Block Funding Allocation Year on Year

	2023/24	2024/25	£ increase	% increase
Schools Block Baseline (excludes growth funding)	£114.940m	£115.677m		
MSAG – included in baseline	£3.865m	£3.865m		
Revised baseline	£118.805m	£119.542m	£0.737m	0.62%

- 4. Schools Block – Provisional Modelling for 2024/25 Schools Block Budget Shares for Mainstream Schools**
- 4.1.** Rescheduled school funding workshops are taking place for mainstream maintained and academy schools on the 1st, 2nd and 7th of November 2023. An overview of the National Funding Formula will be provided and indicative 2024/25 budgetary information discussed in detail with a steer towards producing three-year budget plans from 2024/25 to 2026/27.
- 4.2.** The revised modelling for 2024/25 uses the ESFA's revised Authority Proforma Tool (APT) and operational guidance to model two affordable budget allocation models for 2024/25 based on the initial allocation which excludes growth and is based on the October 2022 census.
- 4.3.** It should be noted that the models provided are to illustrate the impact on allocations from changing key variables allowed within the NFF in 2024/25:
- NFF values after area cost adjustment for inner London
 - Factor rates uplifted by a percentage across all factor rates in so far this is affordable within each model to ensure all funding is allocated.
 - Minimum Funding Guarantee (MFG) set within the required level by the NFF
 - This is the minimum increase in funding through pupil led funding factors year on year
 - The MFG must be set between an increase of 0% and 0.5% for 2024/25
- 4.4.** Two models are provided to understand the impact across schools from local discretion afforded within the NFF when setting MFG at the lower and upper limit of 0% and 0.5% respectively.
- Model 1 – Minimum Funding Guarantee on pupil led factors set at the maximum affordable level up to the limit of 0.5%
 - Note that MFG at 0.5% is unaffordable with the revised and reduced funding allocation.
 - Mirrors the NFF factor rates after area cost adjustment for inner London. Note that no uplift on national rates are now affordable within Model 1 following the revised and reduced allocation.
 - Resulting total MFG deployment is £2.714m
 - Model 2 – Minimum Funding Guarantee on pupil led factors set at 0.0%
 - Mirrors the NFF factor rates and allows for 1.12% uplift on inner London NFF rates
 - Resulting total MFG deployment is £1.432m
- 4.5.** Each model assumes continuing support to the High Needs Block through a 1% transfer from the Schools Block.
- Continues the level of block transfer agreed by Schools Forum and the Minister of State for the 2023/24 budget.
 - The value of the block transfer on the provisional budget is £1.182m.
 - A disapplication above a level of 0.5% requires Schools Forum approval and a disapplication to the Minister of State.

- The continued disapplication is required for the short to medium term sustainability of the High Needs Block.
- 4.6. The options that have been modelled are all compliant with the guidelines set by the DfE. There is limited scope to suggest different options within the guidelines as the resulting changes to funding are marginal.
- 4.7. The updated APT will be issued in December 2023 populated with the October 2023 census and including growth/falling rolls funding. The growth/falling rolls funding and final census may enable greater flexibility in the model to increase the factor rates further above the NFF ACA level.
- 4.8. Financial illustrations are based on October 2022 pupil data and are therefore indicative only pending final modelling following confirmation of the October 2023 census data.

5. Falling Rolls Fund

- 5.1. Local authorities will continue to have discretion over whether to operate a falling rolls fund in 2024/25. If a falling rolls fund is provided, the criteria for providing it must be in line with new NFF criteria introduced in 2024/25. For the first time in 2024/25, the ESFA will allocate funding based on both growth and falling rolls, if applicable. This will be confirmed in December 2023.
- 5.2. The requirement that schools must be Ofsted rated 'good' or 'outstanding' to be eligible for falling rolls funding will no longer apply from 2024/25.
- 5.3. From 2024/25 falling rolls funding can only be provided where school capacity data 2022 (SCAP) shows that school places will be required in the subsequent three to five years. This is a mandatory requirement within the NFF. This replaces the previous guidance of local planning data showing that surplus places will be needed within the next three financial years.
- 5.4. It is not proposed at this stage to establish a falling rolls fund in 2024/25. This will enable funding to be allocated to all schools via the formula factor rates.
- 5.5. H&F's approach in managing the impact of sustained roll falls is to focus schools on medium term budget planning and scenario planning around numbers on roll. This approach could be reconsidered in January 2024 if significant unexpected roll falls are evident following the Autumn 2023 census and are confirmed by falling rolls funding being announced in the final allocation notified by the ESFA in December 2023.

6. Maintained Schools Only - De-delegated Budgets and Statutory Education Functions 2024/25

- 6.1.** De-delegated services and statutory education functions are for maintained schools only. The funding is allocated through the schools funding formula but can be passed back for maintained schools with Schools Forum approval. De-delegation is made from individual school budgets on the basis of pupil headcount.
- 6.2.** The value of the de-delegation and statutory education functions deduction for maintained primary schools has reduced following the academisation in 2023/24 of two maintained primary schools. Further, inflation and local government pay settlements for 2022/23 and 2023/24 have exceeded schools funding growth over the period. This puts the budgets for de-delegation and statutory education function budget for maintained primary schools under significant pressure.
- 6.3.** It is proposed that:
- increases in the budgeted deduction from maintained primary budgets for de-delegation are limited to 3.98% for 2024/25. This is the core funding increase of 0.62% for 2024/25 plus the 3.36% MSAG funding now mainstreamed in 2024/25. This ensures the increase in the deduction does not exceed the overall funding increase from MSAG and core funding.
 - Should the final funding allocation increase in December 2023, this will be reflected in final budgets proposed for de-delegation and statutory education function budgets in the final proposals at Schools Forum in January 2024.
 - the budget for core services including statutory functions and School Improvement is increased to meet the cost of inflation awards.
 - the inflationary pressures and reduced funding as a result of recent academisations of maintained schools are offset by a reduction in the budgeted contingency for schools in financial difficulty.
- 6.4.** More detailed information on the de-delegated and statutory education functions budgets 2024/25 will be shared with maintained schools during the Autumn Term and ahead of Schools Forum final budget decisions in January 2024.

7. Notional SEN Review Work Autumn 2023

- 7.1.** Mainstream maintained schools and academies are notified each year of a clearly identified but notional SEN budget within their overall budget allocations. This budget is not a budget that is separate from a school's overall budget. It is an identified amount within a maintained school's delegated budget share or an academy's general annual grant. It is intended as a guide for school's spending decisions for its pupils with SEN.

- 7.2. The ESFA are recommending that LA's check that the notional SEN calculation for 2024/25 is made in line with 2024/25 guidance and is reviewed on an annual basis.
- 7.3. H&F will undertake an exercise to do a detailed analysis and review of the 2024/25 notional SEN budget in advance of the Schools Forum meeting scheduled for 16th January 2024.
- 7.4. A further consultation will be launched to get schools feedback on the notional SEN budget review.

8. Revised Consultation Questions for Feedback

The relaunched and revised consultation survey should be completed by close of business on Friday 10th November 2023.

<https://forms.office.com/e/7edzVRG52s>

We would be grateful if schools could coordinate their responses between interested parties and return only one response per school.

Papers and 2024/25 budget modelling are published on the website under October 2023 Schools Forum.

<https://democracy.lbhf.gov.uk/ieListDocuments.aspx?CId=473&MId=7628&Ver=4>

Revised supporting papers will be circulated with this revised consultation document from 1st November which reflect the revised modelling following the DfE's funding correction.

Note Questions 1-3 relate to respondent information.

Question 4 – The LA is recommending setting the schools budget at the maximum Minimum Funding Guarantee (MFG) affordable. This has been calculated at 0.25% in Model 1. This percentage may change once the final funding levels are confirmed in December 2023. This approach results in a higher proportion of funding being allocated through the MFG rather than through pupil-led factors.

Do you agree with this approach?

Question 5 - Please provide any comments or feedback on the recommendation that the MFG is set at the maximum affordable of 0.25%.

Question 6 - The other option (Model 2) is to set the MFG at 0% per pupil increase on pupil-led factors and distributes the funding by an uplift on the funding factors. This distributes a higher proportion of the total funding to schools based on the characteristics of their pupil cohort.

Do you think the schools funding allocation should be distributed on this basis?

Question 7 - Please provide any comments or feedback on Model 2 which sets MFG at 0% and distributes a higher proportion of funding through the funding factors.

Questions 8 & 9 – Falling Roll Provision (see section 4)

Do you agree with the recommendation?

Do you have any comments or feedback on the proposal not to establish a falling rolls fund in 2024/25 which enables funding to be allocated to all schools via the formula factor rates.

Questions 10 & 11 – 1% Schools Block to High Needs Block Transfer (see section 3)

Do you agree with the proposal?

Do you have any comments or feedback on the proposal to transfer 1% or estimated £1.182m of Schools Block funding to support expenditure for Hammersmith and Fulham’s children with high needs in 2024/25?

Question 12 – Proposed 2023/24 De-delegated and Education Functions Budgets (Maintained Schools Only) (see section 5)

Do you have any feedback on the proposed maintained schools budgets for de-delegated items and education functions? This is increasing the contribution by 3.98% and to limit contingency funding.

Question 13 – Any other comments or feedback?

Please let us know of any other comments or feedback on the proposed Hammersmith and Fulham Schools Block Funding Formula or other ways to reduce costs through innovation, further collaboration or cost sharing arrangements?

REPORT ENDS

Explanation of Recommended approach to MFG & Factor Uplifts above NFF

Key Principles Model 1 (Recommended):

First: Maximise the Minimum Funding Guarantee (MFG) percentage increase at revised 2024/25 National Funding Formula (NFF) rates (after area cost adjusted for inner London), and up to the maximum 0.5% increase year on year increase on pupil led funding allowed by the NFF.

This will ensure that all schools received the same minimum uplift year on year on pupil led funding up to 0.5% limit and up to the level that the provisional funding allocation (revised October 2023) and final funding level to be confirmed December 2023 can afford.

MFG above 0% prevents any school seeing decreases in funding year on year versus 2023/24 financial year which might have been the case with funding allocated via the funding factors alone. 19 schools in H&F would have seen funding decreases per pupil year on year without MFG protection.

Second: Once 0.5% MFG has been achieved, increase all local factor rates above NFF factor rates by set % uplift across all factors until all available funding has been allocated through the Authority Proforma Tool for 2024/25.

It should be noted that this ensures Hammersmith and Fulham rates continue to mirror and track NFF factors rates as is a requirement of the Hard National Funding Formula.

Schools will benefit to differing levels depending on the characteristics of their cohort as represented by the schools Autumn census.

How Model 1 allocates funding within revised funding allocation October 2023:

First: The maximum MFG % affordable within the revised allocation for 24/25 is 0.25% when factor rates are set at NFF rates after area cost adjustment. MFG cannot be increased further without exceeding the available funding. All schools receive at least 0.25% increase in pupil led funding year on year. £2.7m of funding is allocated via MFG in model 1, benefitting 45 out of 47 schools. 2 out of 47 schools do not require MFG to ensure a 0.25% increase as they receive this increase via the factor rates in the NFF.

Second: There is no funding available to increase rates above the NFF level. Resulting H&F factor rates for IDACI deprivation, low prior attainment, EAL and mobility fall slightly below 2023/24 H&F levels as a result. However, schools are compensated by the MFG protection at 0.25%.

Note: If additional funding was announced in December 2023, this would be allocated via an uplift in NFF rates.

Key Principles Model 2 (Not Recommended):

First: Set Minimum Funding Guarantee at 0% increase year on year on pupil led factors, the lowest MFG rate allowable within the NFF. MFG at 0% prevents any school seeing decreases in funding year on year versus 2023/24 financial year which might have been the case with funding allocated via the funding factors alone. 19 schools in H&F would have seen funding decreases per pupil year on year without MFG protection.

Second:

Once 0% MFG has been achieved, increase all local factor rates above NFF factor rates by set % uplift across all factors until all available funding has been allocated through the Authority Proforma Tool for 2024/25.

It should be noted that this ensures Hammersmith and Fulham rates continue to mirror and track NFF factors rates as is a requirement of the Hard National Funding Formula.

Schools will benefit to differing levels depending on the characteristics of their cohort as represented by the schools Autumn census.

Explanation of how Model 2 allocates funding within revised funding allocation October 2023:

First: MFG % set at 0%. £1.4m of funding is allocated via MFG in model 1, benefitting 19 out of 47 schools.

Second: All NFF factor rates after area cost adjustment can be increased by 1.12% before all provisional funding is allocated.

Note: The updated provisional funding models provided in week commencing 30th October 2023 uses the revised October provisional Schools Block funding allocation 2024/25 and the October 2022 census. The final allocation of funding will be confirmed by the Education Skills Funding Agency in Late December 2023 with the confirmed October 2023 school's census.

Final allocations according to the principles of the consultation will be shared with Schools Forum in January 2024.

Consultation Workshops –
Budget 2024/25

Finance Workshop

Valerie Irolla
Caroline Baxter
Tony Burton

Page 44



Agenda

- Quick Introductions
- Key Changes Mainstream Schools Funding 2024/25
 - National and Local Context
- Consultation Process and Budget Timeline
 - Timetable
 - Consultation and feedback
 - Role of Schools Forum
- Overview of NFF, Provisional Modelling and Schools Forum Papers
- Detailed Provisional Modelling for 2024/25
- Importance of Budget Planning and Review
- Questions and Answers

Financial Context and Schools Funding

Schools Block - Mainstream Schools Reception to year 11

Nationally:

- DfE Core school funding increased 2.7% nationally in 2024/25 compared with 2023/24 – based on figures released in Summer 2023. However, the DfE announced national funding error and £370m reduction in funding advised in October 2023.
- Cost of living impact and significant teaching and non-teaching pay demands as well as other cost inflation
- Mainstream Schools Additional Grant (MSAG) mainstreamed in core funding from 2024/25. Will not be paid as separate grant from 2024/25.
- The Teachers Pay Additional Grant (TPAG) provides an additional £482.5m in 2023/24 and £827.5m in 2024/25. This grant is payable to mainstream, special and alternative provision schools. The TPAG is not included in the National Funding Formula (NFF) for 2024/25 as it is being allocated as a separate grant.

Financial Context and Schools Funding

Schools Block - Mainstream Schools Reception to year 11

Locally, more limited growth:

- Relative position of H&F Schools – the initial allocation for 2024/25 (based on October 2022 pupil numbers) is £119.5m including £3.87m MSAG.
- This is after the £0.5m funding reduction for H&F due to DfE pupil number error nationally
- This represents a 0.62% increase year on year before Growth funding.
 - Funding increases will need to cover all inflationary costs including pay uplifts agreed nationally and increments from April 2024.
 - Therefore continues to be a very constrained financial position over the medium term.
- NFF and next steps
 - Currently H&F Schools funded circa £2.714m above NFF rates. This is represented by Minimum Funding Guarantee value in model 1 when rates are set at NFF rates
 - Concern that with continued cost inflation, limited future block funding increases that schools in H&F could see sustained real terms fall in funding.
- NFF and proxies of need to allocate funding. This is the reason for funding differentials that can be observed between schools

Process for Schools Core Budget & Consultation

Timeline

- 3rd October Schools Forum – introduction to 2024/25 budget process, modelling on provisional funding allocations and agree basis for consultation
- Original planned consultation from 3rd October to 31st October - Schools Block 2024/25 budget consultation and workshop via Teams
- Revised consultation commenced 1st November with reduced funding and revised National Funding Formula factor rates and modelling proforma provided by the ESFA
- Workshops online weeks commencing 30th October and 6th November for Headteachers, School Business Managers and Finance Directors and school Governors
- 14th November - Schools Forum decisions following consultation responses
 - Dis-applications including HNB Transfer 1% at £1.182m
- Information and consultation on:
 - Detailed de-delegated and statutory education budgets and school level budget contributions (maintained Schools only)
 - Information and analysis around the role and purpose of Notional SEN within the National Funding Formula
- Late December 2023 - DfE release final Authority Proforma Tool with October 2023 census data and final funding allocation for H&F released by ESFA
- Week Commencing 8th January 2024 – online School Budget Update Briefing via Teams
- 16th January 2024 - Schools Forum decision on final school budget recommendations

Role of Schools Forum

Schools' Forum membership – representatives from schools, academies and non-school organisations such as nursery and 16-19 education providers.

The local authority (LA) can decide the size of the forum including the need for representation based on type of school and the LA's policy on representation of non-school members.

Schools' forums generally have a consultative role apart from some specific decision making powers on local authority proposals:

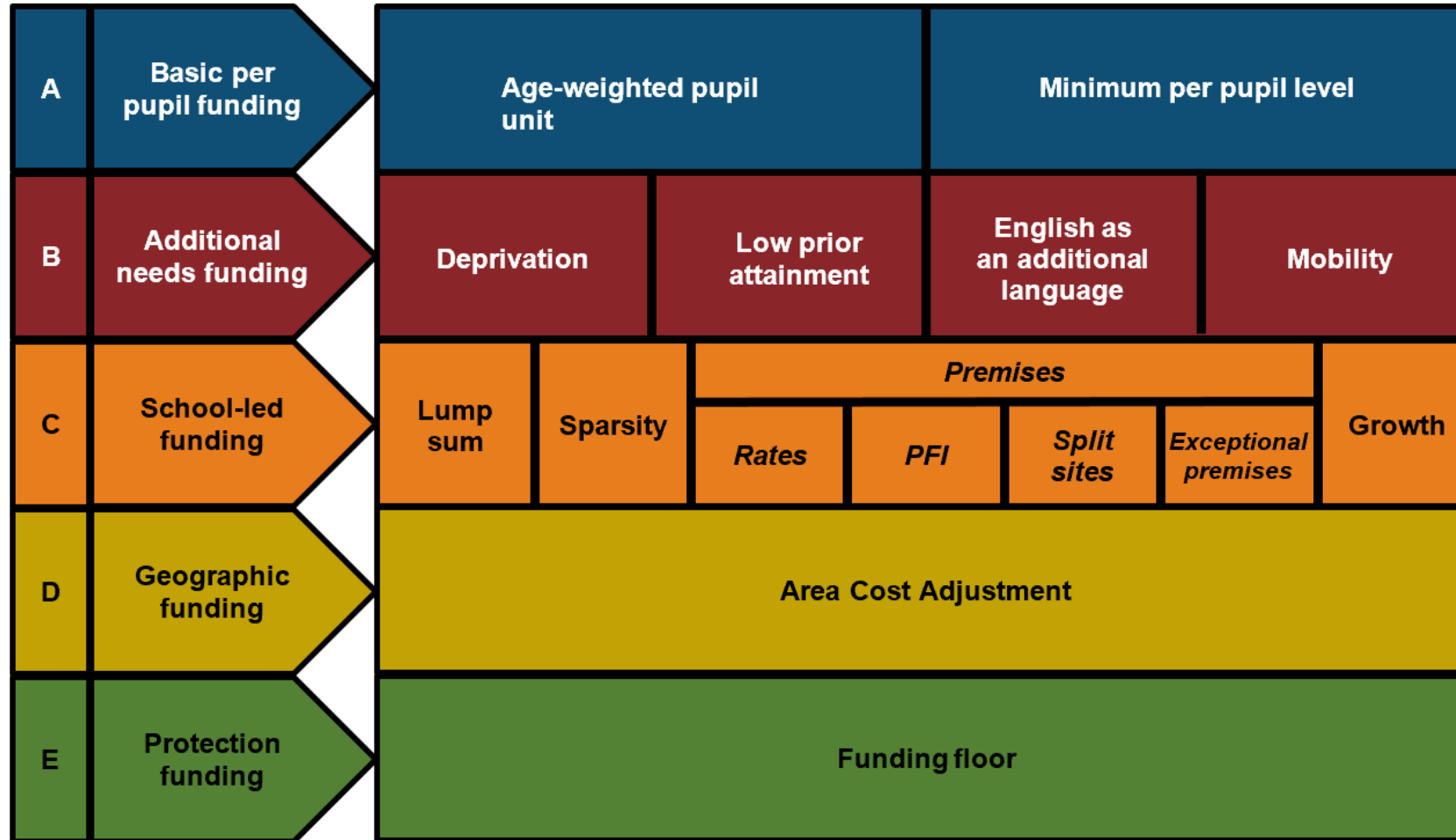
- de-delegation, growth fund, falling rolls, agreeing other centrally retained budgets
- funding for central early years expenditure
- block transfers of up to 0.5% from the schools' block to other blocks

The LA must consult the schools' forum annually:

- amendments to the schools funding formula
- arrangements for the education of pupils with special educational needs (place and top-up funding)
- arrangements for the education of children otherwise than at school
- arrangements for early years provision and administrative arrangements for the allocation of central government grants paid to schools via the LA.

National Funding Formula (NFF)

- Second year of the ‘hard’ NFF in 2024/25
- Structure of the NFF largely unchanged



2024/25 Revised Provisional Modelling

Schools Forum 3rd October 2023 set out the provisional modelling for 2024/25 mainstream schools budget shares using the DfE's Authority Proforma Tool

- According to the governments National Funding Formula, operational guidance and grant regulations for 2024/25
- Mirrors National Funding Formula Factor rates as required by conditions of grant

Modelling and consultation process suspended pending rework of models to lower level of funding. Relaunched 1st November with closing date 10th November and 3 briefing workshops.

Revised models:

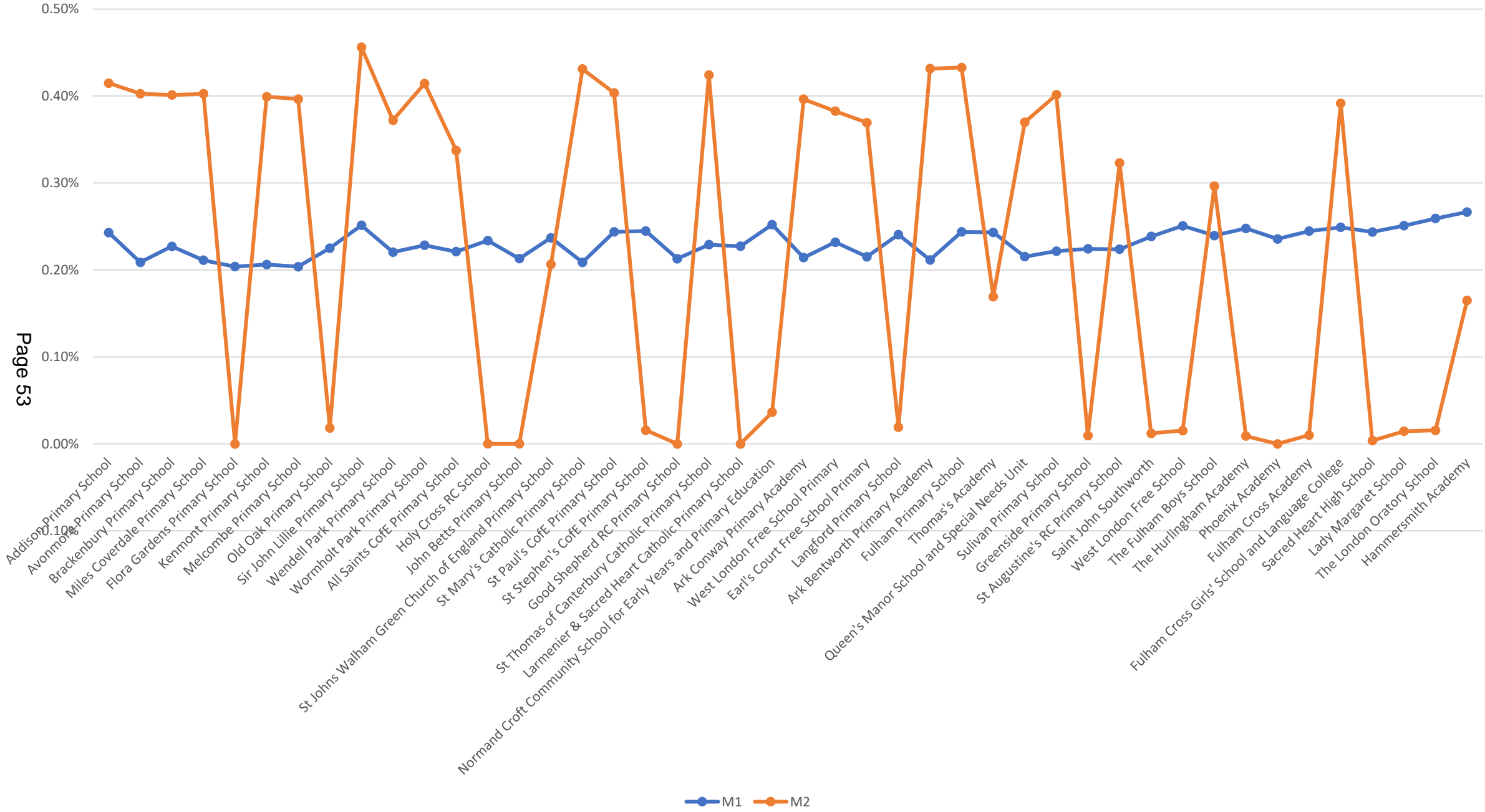
- No falling rolls provision pending December 2023 final budget
- Schools Block to High Needs Block Transfer request at 1% or £1.182m
- Key variables – Minimum Funding Guarantee and Factor rates

Modelling Differences

Two models are provided to understand the impact across schools from local discretion afforded within the NFF when setting MFG at the lower and upper limit of 0% and 0.5% respectively.

- Model 1 – Minimum Funding Guarantee on pupil led factors set at the maximum affordable level up to the limit of 0.5%
 - Note that MFG at 0.5% is unaffordable with the revised and reduced funding allocation. Revised provisional modelling sets affordable MFG at 0.25%.
 - Mirrors the NFF factor rates after area cost adjustment for inner London. Note that no uplift on national rates are now affordable within Model 1 following the revised and reduced allocation.
 - Resulting total MFG deployment is £2.714m
- Model 2 – Minimum Funding Guarantee on pupil led factors set at 0.0%
 - Mirrors the NFF factor rates and allows for 1.12% uplift on inner London NFF rates
 - Resulting total MFG deployment is £1.432m

Pattern of Per pupil % Increases Model 1 and 2
Note: Excludes schools 3 schools with outlying changes



Reasons for Supporting High Needs Block (HNB) Budget

- Requirement to balance the schools' budget across the mainstream and high needs system
 - Cost of living impact on HNB pressures
 - Lower expectations around future HNB funding growth over the medium term versus that originally modelled per DfE advice
- Ensures remaining £2m of £20.5m DfE High Needs Safety Valve funding to 2024/25 is secured.
- Supports High Needs expenditure in H&F special and mainstream schools with respect to EHCPs and Early Intervention support
 - Special School MFG for 2024/25 at 0.5% - which mirrors the mainstream MFG
 - Allows continued early intervention offer in H&F mainstream schools, for example the Joint Communication Team and Autism Education Training Trust to support building capacity in mainstream schools

Importance of medium term financial planning/horizon scanning

- Responsibility for budget is delegated to schools. Schools must set a delegated budget as per their statutory responsibility
- 3-year budget planning required, 2024/25 in detail plus 2.
- Recommend that budget process is significantly progressed with Governors by Autumn term each year with ratification in Spring Term ahead of statutory deadline to submit to ESFA/LA.
- Deficit budgets must be recovered via a deficit recovery plan and from within the schools' budget over the short to medium term. Preference to avoid deficit position by medium term planning as far as possible
- Deficits or likely deficits should be formally notified to the Director of Education and Head of Finance for Children's Services and Education at the earliest opportunity
- Limited resources to support deficits within the maintained primary school de-delegated contingency fund
 - Any use of funds to be agreed by subgroup of Schools Forum through peer review and will be targeted at schools with sustainable budget plan and with limited reserves
 - Schools should avoid running down reserves and then requested financial support
- Outward looking - possibilities for partnership working, resource sharing, partnership and joint working (formal and informal options for schools to explore)
- Contract and procurement options and negotiations for efficiency and VFM

Questions and Answers?

