

Schools Forum Agenda

Tuesday 2 July 2024 at 2.00 pm

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

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1. APOLOGIES FOR ABSENCE	
2. MINUTES OF THE LAST MEETING To agree the minutes of the previous meeting as a correct record.	2 - 4
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4. Q1 UPDATE: HIGH NEEDS BLOCK 2024/25 Schools Forum to note the current position and progress of the transformation programme across the High Needs Block (HNB).	9 - 14
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amrita.white@lbhf.gov.uk
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Agenda Item 2

London Borough of Hammersmith & Fulham

Schools Forum Minutes

Tuesday 5 March 2024

PRESENT

Voting members	Non-voting members
School Members Anne-Marie (Thames Federation) Dave Colins (Brackenbury School) Kathleen Williams (Holy Cross Primary) Michele Barrett (Randolph Beresford/ Vanessa Nursery) Imogen Lavelle (The Good Shepherd)	Observers Katie Beardsworth Aiden Smith Jacqueline Munro
Academies and Free Schools Gary Kynaston, Hammersmith Academy (Chair)	
Non-Schools Members Jane Gleasure (Little People, Early Years)	

Officers

Peter Haylock (Director of Education and SEND)
Tony Burton (Head of Finance for Children's Services and Education)
Irolla Valerie (Principle Accountant)
Satwinder Saraon (Strategic Lead for Education, Early Years and Transformation)
Caroline Baxter (Finance Manager)
Anjeli Chadha (Principal Accountant - Corporate Finance)
Amrita White (Committee Coordinator)

1. **APOLOGIES FOR ABSENCE**

Apologies of absence were received Daniel Upfield and Alex Parker

2. **MINUTES OF THE LAST MEETING**

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

3. **FINAL EARLY YEARS FUNDING 2024/25**

Tony Burton (Head of Finance for Children's Services and Education) presented the item that covered the final allocation of early years Block funding for 2024/25 based on January 2023 census numbers as agreed by Cabinet on 12th February 2024 and following consultation with the sector in January and early February.

The proposals were presented at early years workshops held on 18th January for maintained nurseries and primaries with nursery provision and on 22nd January for the private, voluntary, and independent sector including childminders.

RESOLVED

The schools Forum noted the report

4. DEDICATED SCHOOLS GRANT MONITORING Q3 2023/24

Tony Burton (Head of Finance for Children's Services and Education) presented the report which covered the 2023/24 quarter 3 budget monitoring position after updates to the allocation received in July 2023 from the Education and Skills Funding Agency (ESFA). It also included the forecast accumulated Dedicated Schools Grant (DSG) carry forward deficit position with respect to the High Needs Block (HNB). The retained HNB deficit at 31/03/22 was £4.749m after receipt of £17.55m of agreed safety valve funding since the commencement of the agreement.

In response to a question asked by the Chair, Tony Burton explained that the retained deficit was forecast to reduce to £3.193m at 31/03/24 following the receipt of £1.5m further safety valve funding in 2024/25 financial year. Further information regarding the provisional funding allocations for 2025/26 would be brought to the July schools forum.

Referring to the proposed allocation from 2023/24 falling rolls provision, the Chair noted that the methodology employed deemed reasonable and was happy for this to be progressed.

The Chair asked for further clarification to be provided on any feedback from the early year workshops. Tony Burton noted that there was good attendance of over 60 providers at the workshops with representatives from all areas of the early years sector. He provided a summary of the headline takeaways noting that the under 2's offer compared more favourably than to other neighbouring local authorities.

Satwinder Saraon (Strategic Lead for Education, Early Years and Transformation) noted that the workshops and survey conducted were relatively well received.

RESOLVED


The schools Forum noted the report and approved the falling rolls funding proposed 2023/4 budget.

Meeting started: 2:00pm
Meeting ended: 2:30pm

Chair

Contact officer: Amrita White
Governance and Scrutiny
E-mail: amrita.white@lbhf.gov.uk

Agenda Item 3

	<p>London Borough of Hammersmith & Fulham</p> <p>SCHOOLS FORUM</p> <p>Tuesday 2nd July 2024</p>
<p>DEDICATED SCHOOLS GRANT MONITORING QUARTER 1 2024/25</p>	
<p>Open</p>	
<p>Wards Affected: (All Wards); All</p>	
<p>Accountable Director: Jacqui McShannon, Executive Director of People’s Services</p>	
<p>Report Author: Tony Burton Head of Finance for Children’s Services and Education</p>	<p>Contact Details: E-mail: tony.burton@lbhf.gov.uk</p>
<p>Purpose of the report</p> <p>This report updates forum on:</p> <p>The 2023/24 outturn position on the Dedicated Schools pending retrospective Early Years Dedicated Schools Grant Funding adjustment for 2023/24</p> <p>The 2024/25 budget and forecast outturn position on the Dedicated Schools Grant at 31st March 2025.</p>	

1. Introduction

1.1. This paper sets out:

- Carry forward balances at 1st April 2024
- Forecast variances in each of the blocks of the Dedicated Schools Grant in 2024/25.
- Projected closing balances at 31st March 2025

2. Summary Position

2.1. Table 1 below shows the high-level position for 2024/25 financial year at quarter 1.

Table 1 – Accumulated Adjusted DSG Carry Forward from 2023/24 (balances at 31/03/24 and forecast balances at 31/03/25)

Dedicated Schools Grant (DSG) Balances by Block				
Figures in red and brackets represent surplus	Balance 31/03/24	2024/25 Forecast Variance	Forecast Balance 31/03/25	Comments
	£m	£m	£m	
Schools Block	0	0	0	All funding passported to schools per grant regulations No Falling Rolls Fund established 2045/25 Maintained primary school budget underspends to be returned
Central Services Schools Block	0	0	0	Nil variance after budgeted £0.511m transfer to support HNB expenditure
High Needs Block (including Safety Valve £4m)	2.378	(1.416)	0.962	£2.04m Safety Valve funding received in 2023/24. £0.960m final Safety Valve Payment expected in 2024/25
Early Years Block	(0.134)	0.134	0	Surplus balance held pending confirmation of final 2023/24 grant adjustment
TOTAL DSG	2.244	(1.282)	0.962	

3. High Needs Block

3.1. The High Needs Block is forecast to underspend by £0.456m versus the funding allocation in 2024/25. This represents a significant improvement versus overspend on High Needs over recent years. This is after the budgeted application of £0.511m transfer from Central Services Schools Block and £1.172m transfer from the Schools Block.

3.2. The retained HNB deficit at 31/03/23 was £2.378m after receipt of £19.54m of agreed Safety Valve funding since the commencement of the agreement. £2.04m of Safety Valve Funding was received in 2023/24 with some of the profiled funding for 2024/25 paid early by the ESFA.

- 3.3. The retained deficit is forecast to reduce to £0.962m at 31/03/25 following the receipt of £0.960m further safety valve funding in 2024/25 financial year.
- 3.4. The import/export funding adjustment on the high needs block will be confirmed in Summer 2024 for the 2024/25 budget, as will the provisional High Needs Block Funding allocations for 2025/26 financial year.
- 3.5. It should be noted that inflationary pressures in the wider economy since early 2022 may drive unbudgeted cost pressures over the medium term. Such pressures will be monitored closely.

4. Schools Block and Maintained De-delegation 2024/25

- 4.1. Table 2 shows the Local Authority held budgets for the Schools Block for maintained primary schools and High Needs totalling £36.477m after the Academy conversion of St Augustine’s Primary.
- 4.2. A further £81.381m of the Schools Block has been recouped by the ESFA and paid directly to academy and free schools via their GAG funding, including £1.275m for academy conversions since 01/04/24.

Table 2 - Schools Block Forecast 2024/25

	£m	£m	£m
	2024/25 Budget	2024/25 Forecast	2024/25 Variance
Schools Block delegated (after academy recoupment) Maintained Primary Only	36.822	35.580	(1.242)
Falling Rolls Fund	Nil	Nil	Nil
Maintained schools de-delegated Budget	0.622	0.600	(0.022)
Maintained schools Education Functions	0.307	0.296	(0.011)
Transfer to High Needs Block	1.172	1.172	0
Total Schools Block received by LBHF	38.923	37.648	(1.275)

- 4.3. Underspends on the maintained schools de-delegated budgets and education functions will be confirmed to maintained primary schools in March 2025 prior to the financial year close.
- 4.4. De-delegated budgets include £103,000 for maintained primary schools in financial difficulty. Several maintained primary schools are working on deficit recovery plans. A subgroup of the Schools Forum will meet to discuss potential allocations from the fund prior to Schools Forum in the Autumn Term. Any unspent de-delegated funding at 31/03/25 will be repaid to schools in proportion to their contribution.
- 4.5. No falling rolls fund was established in the 2024/25 Schools Block budget as grant conditions going forward require clear school place planning data that places will be required in the next 3 to 5 years

5. Early Years Block 2024/25


- 5.1. The Early Years Block held a surplus carry forward balance of £0.134m at 01/04/24 and pending the final 2023/24 grant allocation expected to be confirmed by the ESFA in the Summer term.
- 5.2. The Early Years block is currently forecast to spend to budget in 2024/25 based on current data available and estimates of the uptake of the new entitlements for two year old and under two year olds.
- 5.3. Funding versus activity will be monitored closely at each census point in the financial year.

6. Central Services Schools block 2024/25

- 6.1. The CSSB block is forecast to outturn to budget at £2.106m in 2024/25, including the £0.501m budgeted contribution to the High Needs block.

Report ends

Item 4

	<p>London Borough of Hammersmith & Fulham</p> <p>SCHOOLS FORUM</p> <p>July 2024</p>
<p>Q1 Update: High Needs Block 2024/25</p>	
<p>Open</p>	
<p>Classification - For Scrutiny Review & Comment</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 provides an update on the High Needs Block programmes of work and performance against the Department for Education Safety Valve Agreement at Q1.</p>	

Recommendations:

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

Q1 2024/25 - 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	RAG	RAG
<p>Progress Update:</p> <p>Good progress continues to be made in embedding our early intervention activity across the local area.</p> <p>Officers have working to develop a single SEN Support pathway to streamline access for settings and families. This will launch in the summer term. This includes a new Advice Service via our Local Area SENDCO who will triage referrals to ensure:</p> <ul style="list-style-type: none"> • The Ordinarily Available Guidance is being appropriately implemented. • For more complex cases, coordinating a ‘team around the child’ discussion 			

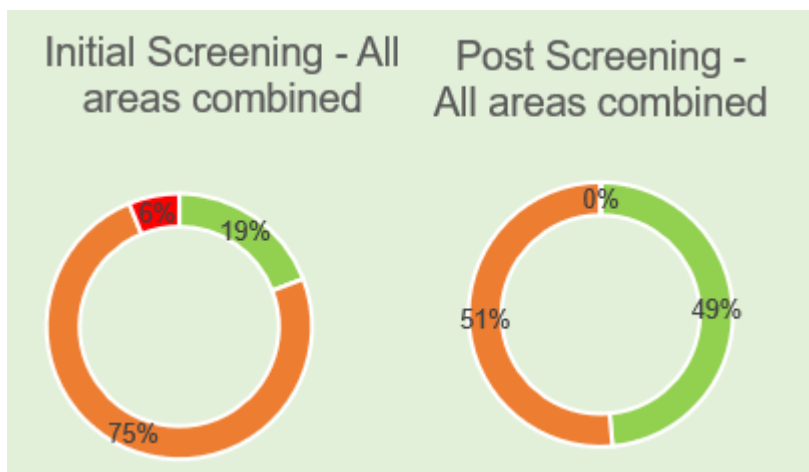
via the new SEND Support panel.

- Ensure the effective use of time limited inclusion funding to decrease escalation to statutory processes both across early years and school age.
- The robust use of data to measure baseline and post intervention support to test the efficacy of interventions.

The new streamlined pathway will be launched in the Summer Term.

Officers continue to roll out the Autism Education Trust programme to settings. A total of 6 modules to 29 delegates have been delivered since February half term, with an average AET compliance score of 4.75 against the target of 4.2. 90% of schools have now engaged with the AET training.

Progress continues to be sustained in the roll out of our early intervention speech, language, and communication needs offer. 84% of primary settings and 91% of secondary settings have now engaged, this is a significant increase since the Autumn term. In the Spring term 241 members of the school workforce have attended the universal training sessions and reported an average increase in knowledge from 5.7 to 8.3 post training (of a 10-point scale). For the academic year to date, 136 children have been screened across 17 schools. Initial data for those schools who have rescreened following two months of targeted interventions demonstrates significant progress across all key domains post intervention.



Work programme	Assurance Level		
Review of Alternative Provision model	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Green	RAG	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	RAG	RAG
<p>Progress Update:</p> <ul style="list-style-type: none"> • Designation and descriptor profiles for new SEN Units and ARPs agreed. • Specifications and Service Level Agreements drafted. • Expression of interest/bid template issued to school partners. • Socialisation sessions held with school partners. <p>Next steps:</p> <ul style="list-style-type: none"> • Bottom-up financial review of proposed SEN Units and ARPs as part of SLA negotiations. • Completion of the assessment of SEN Unit/ARP bids for a shortlist recommendation to Education Leadership Team. • Education Leadership Team ratification of candidate SEN Units/ARP schools. • Announcement of successful SEN Units and ARPs. • Resource management review, business planning and completion of MTFs for existing Special Schools and Units. • Review and update sufficiency financial modelling. 			
Work programme	Assurance Level		
Review and reform of outreach services	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Amber	RAG	RAG
<p>Progress Update:</p> <ul style="list-style-type: none"> • A decision was progressed in line with the commitments in our Safety Valve Agreement to develop a dual funding model, through a Local Authority contribution and a traded model between schools and OAT. This decision was approved in November 2023. • Since this decision, across the system we have identified emerging complex behaviour needs in the early year's cohort. These relate particularly to acute behaviour presentation in the Reception age cohort and Key Stage 1. These complex behaviours are requiring high levels of outreach intervention to enable the child to achieve their outcomes and remain in their mainstream setting. These needs are above what we would expect to be ordinarily provided by a school. The absence of this offer in the context of these needs, would likely result in an escalation to statutory processes or exclusion. • Preventing exclusions is important for a plethora of reasons but mostly it is a 			

key factor in improving future life chances for children. Exclusions not only typically lead to isolation and poor academic progress in the short term, but also have far reaching detrimental effects for the young person into adulthood.

- Officers have therefore reviewed the previously agreed approach and recommend maintaining the original arrangements for a further year. This will allow a holistic and joint review SEMH/behaviour pathway with Ormiston Academy Trust to identify opportunities for reducing the current delivery costs in the context of the SEND Special School Organisation Plan to maximise economies of scale, whilst maintaining a robust commissioned service.

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

The case management system has been implemented. There is ongoing work to improve business as usual processes to improve the quality of data and streamline wherever possible. This includes new processes to streamline the reconciliation of commitments to the general ledger and automated workflows for our business support service to raise queries to the casework team. These processes will continue to be reviewed and refined as part of business-as-usual activity.

Work programme	Assurance Level		
Annual Reviews	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Amber	RAG	RAG

Progress Update:

Annual Reviews:

- There has been significant focus on Annual Reviews within the EHC Casework Service.
- The workforce is now stable and there have been additional posts created to focus on the quality and recording of data in our case management system.
- There has been targeted quick win activity with open annual reviews and special schools with a whole team EHC Casework focused workshop on this activity.
- Of the annual reviews completed, 40.16% have been returned by schools within two weeks of the meeting date. 53.76% had a decision made within four weeks. For those reviews completed in Q1 of 2024, this percentage is 64.71% demonstrating the positive trajectory. Where annual reviews were completed and there was a decision to amend 40.54% of plans were issued

in 12 weeks.

- There remains ongoing priority work with settings on the importance and timeliness of annual reviews and improvement of data quality supported by additional supernumerary capacity being met by the Council's General Fund.

Transitions/Preparation for Adulthood (PfA):

- The joint business case for the creation of a new Integrated Transitions Team was successful via the Council's Medium Term Financial Strategy process with significant general fund growth invested.
- A new Transitions Strategic Lead has been onboarded within Adult Social Care initially focused on recruiting and mobilising this new team.
- Once the team is embedded, they will be allocated to all key areas of need that lead in from year 9, allocated to a school and will feed into annual reviews. In the short-term the team are prioritising young people that require adult social care input as a priority.
- A new PfA Board is being developed jointly with Adults and Children's Operational Directors along with a new performance dashboard.
- The Designated Social Care Officer has developed a new Transitions Assessment, following the main care act domains to provide an earlier indication of who may be eligible for Adult Social Care, and areas of need which can be built into annual reviews and wider community support. Pilot currently underway with one of the special schools before wider roll out.

Broader Quality Assurance programme:

- Half termly audits embedded into business as usual.
- QA process in place across all plans as they are being finalised.
- Seeing improvements and consistency across the sample
- Completed multi-agency case tracking exercise. Positive cooperation and support across the partnership.
- Circulated annual parent survey end of February which was codesigned with Parentsactive. Survey is still open and will close at the end of the Easter holidays. 97 responses to date which are still to be analysed.

Work programme	Assurance Level		
Needs assessments and new plans	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Green	RAG	RAG

Progress Update:

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 80.6% for the provision 2023 outturn, against the London average of 54.7% for 2022 (excluding exceptions).

Work programme	Assurance Level		
Medical Needs Guidance	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Green	RAG	RAG
<p>Progress Update:</p> <p>There continues to be robust controls and oversight in place for those young people requiring home tuition. Whilst there was an adverse movement in 2023/24 this was mitigated by other net movements, however, was as a result of complex presentation of need and high-risk young people requiring hybrid and flexible learning. Officers are exploring opportunities to onboard this via the Commissioned Alternative Provision provider to reduce spot purchasing and to consolidate all alternative provision through a single pathway. This will be progressed across the summer term.</p>			
Work programme	Assurance Level		
Schools Block to High Needs Block disapplication	Update 1 (May/June)	Update 2 (September)	Update 3 (December)
	Green	RAG	RAG
<p>Progress Update:</p> <p>The disapplication was submitted to the Safety Valve Team on the 15 November 2023 and confirmed as approved by the Minster on 17 January 2024.</p>			

Item 5 - Schools Forum 2nd July 2024 – Draft Work Programme 2024/25

Note: Dates and items to be confirmed

Tuesday 1st October 2024 2pm

- National Funding Formula Update 2025/26
- High Needs Block Funding 2025/26 – Special Provision
- Schools Block Mainstream Schools Budget 2025/26
- Review of Scheme for Financing Schools and Financial Procedures

Tuesday 12th November 2024 2pm

- Schools Block Mainstream Budget 2025/26 Consultation Feedback
- Notional SEN Review and consultation
- Schools Block to High Needs Block Transfer Decision 2025/26 and Dissapplication Proforma
- 2024/25 Dedicated Schools Grant Qtr3 Monitoring
- High Needs Block Safety Valve Update 2024/25 Quarter 2
- Early Years Block National Funding Formula Modelling 2025/26 for Consultation (TBC – subject to availability of funding allocations and operational guidance)

Tuesday 3rd December 2024 2pm (TBC – subject to timing of Early Years funding data)

- Early Years Block National Funding Formula Modelling 2025/26 for Consultation (TBC – subject to availability of funding allocations and operational guidance)

Tuesday 14th January 2025 2pm

- Final Schools Block Mainstream Budget 2025/26 Proposals
- Early Years Block National Funding Formula Modelling 2025/26 for Consultation (TBC – subject to availability of funding allocations and operational guidance)

Tuesday 4th March 2025 2pm

- Early Years Block National Funding Formula Budget 2025/26 (TBC – subject to availability of funding allocations and operational guidance)
- HNB Safety Valve Qtr3 update
- 2024/25 Dedicated Schools Grant Qtr3 Monitoring

Tuesday 1st July 2025

- 2024/25 Dedicated Schools Grant Outturn
- 2025/26 Dedicated Schools Grant Monitoring Qtr1
- 2025/26 High Needs Block Safety Valve Update Qtr 1