

# Schools Forum

## Agenda

Tuesday 8 July 2025 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](mailto:amrita.white@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 - 6
3. DEDICATED SCHOOLS GRANT OUTTURN 2024/25 This report provides the summary outturn position on the Dedicated Schools Grant (DSG) for the 2024/25 accounted for by LBHF in the financial year.	7 - 11
4. DISCUSSION AND AGREEMENT OF THE SCHOOLS FORUM 2025/26 ACADEMIC YEAR DATES	

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Date issued: 30 June 2025

# Agenda Item 2

London Borough of Hammersmith & Fulham

## Schools Forum

Minutes

Tuesday 21<sup>st</sup> January 2025

### **PRESENT**

<b>Voting members</b>	<b>Non-voting members</b>
<b>School Members</b> Anne-Marie Strachan (Thames Federation) Imogen Lavelle (The Good Shepherd) Dave Colins (Brackenbury School) Karen Cunningham (St John XXIII Catholic Primary) Joe Brown (Old Oak Primary School) Kathleen Williams (Holy Cross Primary) Michele Barrett (Randolph Beresford / Vanessa Nursery)  <b>Academies and Free Schools</b> Gary Kynaston, Hammersmith Academy (Chair) Daniel Cundy (Senior Principal, AP Academies) Sophia Martin (Principal, AP Academies)  <b>Non-Schools Members</b> Jane Gleasure (Little People, Early Years)	Mark Hopper (Trade Union Representative)  <b>Observers</b> Aiden Smith (Governor, Jack Tizard School) Alex Parker

### **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)  
Tiffany Yip (Assistant Committee Coordinator)  
Daryle Mathurin (Head of Assets and Resources - Education and SEND)  
Ozioma Onwochei (Principal Accountant)  
Caroline Baxter (Finance Manager)  
Sahej Grover (Finance Trainee)  
Valerie Irolla (Principal Accountant)

### **1. APOLOGIES FOR ABSENCE**

No apologies for absence were received.

### **2. MINUTES OF THE LAST MEETING**

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

### **3. SCHOOLS BLOCK MAINSTREAM BUDGET 2025/26**

Tony Burton (Head of Finance for Children's Services and Education) presented the item which set out the final school's block allocation of the Dedicated Schools Grant (DSG) for 2025/26 following the receipt of final funding allocations and the Authority Proforma Tool (APT) in December 2024. He highlighted that per pupil funding had increased by 1.72% for Hammersmith and Fulham mainstream schools. Funding allocations had decreased in cash terms year on year due to the reduced number of pupils in mainstream schools.

The Teachers Pay Additional Grant (TPAG), Teachers Pension Employer Contribution Grant (TPECG) and the Core Schools Budget Grants (CSBG) which were separate grants in the 2024/25 financial year had all been incorporated into the final 2025/26 schools block allocation. A baseline adjustment was made by the Department for Education to the 2025/26 allocation, amounting to an additional grant of £6.815m.

Tony Burton noted that responses from the school's block 2025/26 budget consultation supported the principles for allocating the 2025/26 schools block budget and the transfer of 1% of the school's block budget to the high needs block for the 2025/26 budget. Minimum funding guarantee was set at 0.25% and mirrored the National Funding Formula (NFF) factor rates allowing for a percentage uplift of 0% on the inner London NFF rates. Should the disapplication for 1% transfer from the school's block to support the high needs block is rejected, a 0.5% transfer would be considered.

Tony Burton also pointed out that the reduced pupil numbers had caused de-delegated budget to decrease year on year and noted that maintained schools license was now paid directly by schools. Due to the tightening of regulations, a separate falling rolls fund could not be established. Central services schools block reduced by around 1.5% due to the reduction in pupil number, impacting its ability to support high needs block.

Karen Cunningham (St John XXIII Catholic Primary) asked if pupil placement planning would take place to address gaps in schools rolls. Peter Haylock (Director of Education and SEND) responded that with a reduced number of two form entry schools, the scope for planning around rotating plan reductions was limited.

Alex Parker (Observer) asked for further clarification on the pupil funding increases. Tony Burton explained that funding allocation was determined by the number of pupils on rolls. The model mirrored the NFF, including a core rate to reflect some of the grants being incorporated into the mainstream budget. MFG would provide protection against any cohort falling under the minimum funding. The model would converge with the NFF over time, resulting in unusual year on year funding growth over the next years.

Alex Parker further asked how the 1.7% per pupil funding increase was calculated. Tony Burton replied that the schools block baseline excluded additional grants and only total cash funding reduced.

Alex Parker also asked what minus MFG meant. Tony Burton noted that MFG gave protection only to pupil-led funding. If that was not met, MFG would allocate up to -0.25% on pupil-led funding.

Peter Haylock noted that despite the 1% high needs block transfer, pressure on high needs block had not reduced. While pupil numbers had decreased, demand for SEND support was increasing and the complexity of cases was also increasing. The high needs reference group would meet the week after to review key areas, aiming to meet as much needs as possible in maintained schools.

## **RESOLVED**

1. It is recommended that the January 2025 APT for the recommended model is submitted to the ESFA for the 2025 to 2026 schools budget share. This is with the revised uplifted NFF rates detailed in paragraph 4 and in appendix 1 and an MFG value of minus 0.25% per pupil. There are two versions of this model to be agreed pending the DfE decision on the 1% disapplication of grant regulations request.
2. That Schools Forum agreed to the proposal to transfer 0.5% of the total school's block to the high needs block in 2025 to 2026 pending the outcome of the disapplication request to transfer 1% of the school's block to the high needs block. This equates to £0.615m. Should the DfE provide a positive response to the disapplication request, the 1% transfer is recommended to be approved at £1.23m.
3. That maintained school representatives at Schools Forum agreed to the proposed 2025 to 2026 de-delegation budget of £0.555m.
4. That maintained school representatives at Schools Forum agreed to the proposed 2025 to 2026 education functions budget of £0.289m.
5. That Schools Forum agreed to the central services school block budget allocations proposed for 2025/26.

## **4. EARLY YEARS BUDGET 2025/26**

Tony Burton (Head of Finance for Children's Services and Education) presented the report on the initial allocation of early years block funding for 2025/26 including the extended entitlements for working parents of two-year-old children and children from age 9 months. There was very constrained funding growth for 3 and 4-year-olds offer at around £0.04 increase per hour, or 0.6% increase in general. There was a £0.12 increase per hour for maintained nursery schools. The £1.1m maintained nursery school supplementary grant funding included the allowance for maintained nursery school share of teachers pay and pension grant and the September 2024 early years block grant for teachers pay. 2-year-old and under 2-year-old offers received an increased funding of 6.9%.

Tony Burton also updated that the total central spend was proposed at £0.79m. Given the reduction in central spend limit, it was proposed that early intervention services and outreach were to be delivered via H&F maintained nursery schools via an increase in the lump sum budget provision within the 3 and 4-year-old budget model.

Jane Gleasure (Little People, Early Years) enquired how that would be delivered. Tony Burton explained that the allocation was pre-empting a reduction in central spend. The change was only confirmed in December and discussions were underway with maintained nursery schools about the plan going forward.

Michele Barrett (Randolph Beresford / Vanessa Nursery) added that there was initial discussion around increasing support in areas that required improvement, and liaison would continue with the private, voluntary and independent (PVI) and childminder sector.

Jane Gleasure noted that they were at a disadvantage compared to maintained schools and maintained nursery schools, facing pressure from inflation and challenges to early years intervention provision in the borough. She was keen to know how funds would be distributed between the PVI and maintained sector and expressed that she would like to be involved in the decision-making process.

Michele Barrett replied that nothing had been finalised yet but would be in place before April. Tony Burton added that the proposal was to shift provision of early intervention to maintained nursery schools and preserve PVI services. Meanwhile, SEN Inclusion fund continued to expand for early SEND support. Daryle Mathurin (Head of Assets and Resources - Education and SEND) further explained that the plan would be co-produced with PVI providers.

Michele Barrett noted that the maintained nursery sector was under a lot of pressure, and many were looking at closures within the next year or so if no change was in place. Schools were running on a small amount of SEND funding due to most of the budget going to the PVI and childminder sector. Jane Gleasure highlighted that pressure was also coming from the increasing level of social and emotional needs. The Chair assured that those concerns were understood, and work would be done to address them.

## **RESOLVED**

1. Schools Forum noted the engagement, and briefings were undertaken with schools and early years providers from 6th January 2025 ahead of Schools Forum.
2. Schools Forum approved the proposed deployment of central budget in Table 4 above and noted the impact of the impact of passthrough requirement on available central funds from 25/26.
3. Schools Forum noted the proposed 2025/26 Early Year budget across all entitlements including the revised base rates, deprivation and local formulas proposed

## **5. HIGH NEEDS BLOCK 2025/26 UPDATE**

Tony Burton (Head of Finance for Children's Services and Education) updated the Forum on the final high needs block allocation of the dedicated schools grant for 2025/26 following the receipt of final funding in December 2024. The provisional high needs block allocation represented a 7% increase per head of population for 2025/26. The minimum funding guarantee for special schools was currently under review locally to meet needs. It was noted that the high needs block continued to face significant pressure.

Alex Parker (Observer) asked which category of the budget covered top-up fundings and the costs for schools which specialised in high needs. Tony Burton replied that the top-up funding for all providers was given under placement costs. Funding for both academies and maintained schools was included in placement costs or alternative provision.


Alex Parker followed up by asking what the SEND Service category covered. Tony Burton answered that it covered language teachers, directly provided services and some occupational therapists provided by the Council but not education, health and care plans casework.

## **6. ANY OTHER BUSINESS**

Tony Burton (Head of Finance for Children's Services and Education) noted that the Scheme for Financing Schools and Financial procedures which went to Schools Forum in October 2024 had been adopted after consultation with maintained schools. Details would be published on the Council's website soon.

Meeting started: 2:00pm  
Meeting ended: 3.11pm

## Agenda Item 3

	<p align="center"><b>London Borough of Hammersmith &amp; Fulham</b></p> <p align="center"><b>SCHOOLS FORUM</b></p> <p align="center"><b>8<sup>th</sup> July 2025</b></p>
<b>Dedicated Schools Grant Outturn 2024/25</b>	
<b>Open</b>	
<b>Classification</b> - For scrutiny, review and comment	
<b>Key Decision:</b> No	
<b>Wards Affected:</b> All	
<b>Accountable Director:</b> Jacqui McShannon, Executive Director of People	
<b>Report Authors:</b> Peter Haylock – Operational Director of Education and SEND Tony Burton – Head of Finance Children’s Services and Education	
<b>Purpose of the report:</b> This report confirms the 2024/25 outturn for the Dedicated Schools Grant and Balances Held at 31 <sup>st</sup> March 2025.	

### 1. Overview of Dedicated Schools Grant Outturn 2024/25

1.1. The summary outturn position on the Dedicated Schools Grant (DSG) for the 2024/25 accounted for by LBHF in the financial year is outlined below.

<b>DSG Block</b>	<b>2024/25 Funding</b>	<b>2024/25 Outturn</b>	<b>2024/25 Variance</b>	<b>Comments</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>	
Schools Block	35.828	35.828	0	Budget after academy recoupment of £80.755m & transfer to High Needs block
Central Services	2.112	2.112	0	Nil variance after £0.742m support to HNB expenditure
High Needs Block	34.083	35.046	0.963	Funding is after academy recoupment of £5.096m but includes £1.179m transfer from Schools block. <b>Baseline overspend of £5.254m before mitigations - see section 4</b>
Early Years Block*	18.508	17.964	(0.544) Favourable	Favourable position pending 2024/25 ESFA adjustment. Positive funding adjustment expected - £0.167m in Summer 2025
<b>Total</b>	<b>90.531</b>	<b>90.950</b>	<b>0.419</b>	Net overspend £0.419m

\*Note: Early Years Allocation is provision pending Summer 2025 Final Adjustments TBC

- 1.2. Due to the retained deficit position on the DSG, it is expected that favourable variances across the 4 funding blocks offset the retained overall deficit on grant funding held on the balance sheet.
- 1.3. Many local authorities in England currently have DSG deficits, frequently resulting from pressures on their high needs budgets. Since 2020, the government has allowed local authorities to exclude DSG deficits from their main revenue budgets. This accounting treatment ('the statutory override') means local authorities do not breach their statutory duty to set a balanced budget.
- 1.4. The statutory override initially covered the financial years to 2020/21, 2021/22 and 2022/23, but the override period was subsequently extended to cover years up to and including the 2025/26 financial year.

## 2. Schools Block Outturn 2024/25

- 2.1. Summary Schools Block Expenditure for 2024/25 is detailed below.

<b>Schools Block</b>	<b>2024/25</b>	<b>2024/25</b>
	<b>£m</b>	
Maintained Primary Budget Shares Passported	34.932	
Maintained De-delegated and Education Functions budget	0.896	
<b>Total Schools Block received for maintained primary schools</b>		<b>35.828</b>
Schools Block transfer to High Needs by disapplication agreed	1.179	
Academy recoupment	80.755	
NNDR Recouped	1.273	
<b>Total block movements and recoupment</b>		<b>83.207</b>
<b>Total Schools Block 2024/25</b>		<b>119.035</b>

- 2.2. £34.932m for agreed maintained primary budget shares were passported to schools in 2024/25. In addition, £0.031m de-delegated budget for school licences was paid back to schools as this expenditure is now directly incurred by schools.
- 2.3. A small £3,349 underspend on the budget for schools in financial difficulty was used to fund cost increases across trade union facilities and free school meals eligibility checking.



- 2.4. Payments totalling £0.096m were made from the limited maintained primary school fund for Schools in Financial Difficulty contingency in 2024/25. This was to 3 maintained primary schools following consultation with maintained primary school representatives on the Schools Forum. This related to restructure costs as part of deficit recovery or deficit avoidance planning work.
- 2.5. The following further grant values were recouped from the Hammersmith and Fulham schools block allocation by the Education and Skills Funding Agency:
- £80.755m with respect to funding for mainstream academy schools
  - £1.273m with respect to non-domestic rates (Business Rates for mainstream schools)
- 2.6. A block transfer of 1% of the schools block was agreed in Spring 2024 at £1.179m. This was deployed to support High Needs block expenditure as planned in the budget following the agreed disapplication process as part of budget setting.

### 3. Central Services Schools Block

- 3.1. The Central Services Block has been fully deployed in 2024/25.
- 3.2. The budget for support to the High Needs from The Central Services Block was able to be increased due to favourable variances to budget on other budget lines via cost reductions and application of other applicable grants.

### 4. High Needs Block

- 4.1. Summary High Needs Block Expenditure for 2024/25 is detailed below.

High Needs	2024/25	2024/25
	£m	£m
Expenditure Incurred by the LA	38.158	
High Needs ESFA Recoupment	5.096	
<b>Total High Needs Spend Gross 2024/25</b>		<b>43.254</b>
Total High Needs Funding 2024/25		(38.000)
<b>Total Baseline Overspend 24/25</b>		<b>5.254</b>
Less: 24-25 mitigations at Outturn		(4.291)
<b>Mitigated overspend</b>		<b>0.963</b>

- 4.2. The 2024/25 High Needs overspend before mitigations was £5.254m gross, £0.963m after mitigations

Mitigated by:

- £1.179m Schools Block Transfer (planned)
  - £0.960m Safety Valve Funding (planned final payment)
  - £0.742m Central Services Schools Block (£0.511m planned to £0.742m)
  - £1.00m one-off contribution from council reserves for 2024/25 agreed as part of the Safety Valve plan.
  - £0.410m Investment in high needs early intervention services from available Education Section 106 resources.
- 4.3. The High Needs Block is seeing continued pressures from sustained demand, increasing complexity of needs and inflationary impacts of on costs in the high needs system.
- 4.4. Expenditure on special educational needs statutory services has exceeded DSG grant funding and other mitigations in 2024/25. A final grant receipt of £0.960m under the Safety Valve agreement was received in 2024/25 taking the total and final funding received through this mechanism to £20.5m over the period of the Safety Valve agreement
- 4.5. The total retained deficit relating to the high needs overspend is £2.663m at 31<sup>st</sup> March 2025. Growing pressures and more limited mitigation options from 2025/26 presents a challenging picture for Hammersmith and Fulham and reflects the position across much of England.

## **5. Early Years Block**

- 5.1. The 2024/25 grant allocation is subject to retrospective adjustment by ESFA in Summer 2025 when they are due to be revised for the January 2025 census.
- 5.2. 2024/25 Early Years final position is an underspend of £0.544m. A breakdown of outturn variances after expected £0.167m additional funding is as follows:

<b>Budget Area</b>	<b>March 2025 EY DSG Budget £m</b>	<b>Estimated Final (Surplus) /Deficit £m</b>
Contingency – includes £0.062m used for 2023/24 clawback of DSG following January 2024 census	0.195	(0.133)
Special Educational Needs Inclusion Fund	0.623	(0.102)
Participation – All Offers/Entitlements	15.264	(0.167)
Maintained Nursery Lump Sum	0.397	0
Central Expenditure	0.850	(0.100)
EY Pupil Premium and DAF	0.190	(0.042)
Maintained Nursery Supplement	0.989	0
<b>Total</b>	<b>18.508</b>	<b>(0.544)</b>

- 5.3. The favourable outturn presented for 2024/25 includes estimated accruals of £0.167m additional funding income with respect to expected retrospective funding adjustments across all government funded entitlements. This is following an overall increase in activity versus the March 2025 provisional funding allocation which has created a funding upside versus participation led activity,

**Report ends**