

# Schools Forum

## Agenda

Tuesday 11 November 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.	3 - 5
3. SCHOOLS BLOCK TO HIGH NEEDS BLOCK BUDGET TRANSFER 2026/27 DISAPPLICATION This report provides an update on Schools Block to High Needs Block Disapplication request.	6 - 8
4. HIGH NEEDS BLOCK 2025/26 Q2 UPDATE 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.	9 - 12
5. DEDICATED SCHOOLS GRANT Q1 2025/26 MONITORING REPORT This report updates forum on The 2025/26 Quarter 1 monitoring position on the Dedicated Schools Grant following the retrospective Early Years Dedicated Schools Grant Funding adjustment for 2024/25.  A Technical Adjustment required to the Early Years Dedicated Schools Grant Budget 2025/26 resulting in an increase to the Special Educational Needs Budget allocation.	13 - 17
6. 2026/27 NATIONAL FUNDING FORMULA UPDATE - VERBAL UPDATE	

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Date issued: 3 November 2025  
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# Agenda Item 2

London Borough of Hammersmith & Fulham

## Schools Forum

Minutes

Tuesday 8<sup>th</sup> July 2025

### **PRESENT**

<b>Voting members</b>	<b>Non-voting members</b>
<b>School Members</b> Anne-Marie Strachan (Thames Federation) Dave Colins (Brackenbury 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>Observers</b> Aiden Smith (Governor, Jack Tizard School) Alex Parker

### **Officers**

Tony Burton (Head of Finance for Children's Services and Education)  
Daryle Mathurin (Head of Assets and Resources - Education and SEND)  
Valerie Irolla (Principal Accountant)  
Amrita White (Committee Coordinator)

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

Apologies for absence were received from Jacqui McShannon (Director of Children's Services)

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

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

### **3. DEDICATED SCHOOLS GRANT OUTTURN 2024/25**

Tony Burton (Head of Finance for Children's Services and Education) presented the item that covered the Dedicated Schools Grant Outturn for 2024/25. He noted the High Needs in year deficit of £0.963m after all mitigations. The final High Needs Safety Valve Funding had also been received. Safety Valve monitoring continued as well as the expectation of transformation to ensure sustainability of the school budget. 2025/26 Q1 monitoring and High Needs update report would

be brought to the October Schools Forum. Additionally, he highlighted the expectation of a challenging position on schools' budget and High Needs. In response to Alex Parker's (Observer) request for further clarification regarding the challenging position on the school's budget and High Needs funding. Tony Burton explained that this position was primarily due to increasingly constrained funding increases. He noted that there was nothing in the government's recent Spending Review to suggest a significant change to this situation. He highlighted that the Spending review made it clear that funding across government departments would remain tight, while there would be some additional funding allocated to schools. The detail on how this funding would be distributed were not yet clear.

The Chair noted that following the Spending Review, *Schools Week* had carried out some interesting analysis. An article published by them provided a breakdown of funding projections over the next four years, suggesting that the increase in funding would be negligible. In addition, Tony Burton highlighted that over recent years, London had been receiving lower than average increase in school funding compared to the national level. He noted that further information and clarity on future allocations were expected to become available in autumn 2025.

Tony Burton highlighted the 2026/27 budget process which assumed a challenging financial outlook and constrained funding in all areas. The focus of work in the Autumn term would include funding update and discussion of budget setting principles. The 2026/27 funding would be advised following the government spending review in Autumn 2025.

The Chair noted that the High Needs Block remained under significant pressure, with an additional £400k overspend added to the retained DSG deficit in 2024/25

The Schools White Paper expected in the Autumn term would provide the direction of travel with respect to SEND at a national level

#### **RESOLVED:**

The schools Forum noted the report

#### **4. DISCUSSION AND AGREEMENT OF THE SCHOOLS FORUM 2025/26 ACADEMIC YEAR DATES**

Tony Burton (Head of Finance for Children's Services and Education) provided the following provisional dates for 2025:

Tuesday 7th October 2025 2-4pm

- Dedicated Schools Grant Monitoring 2025/26 Qtr1
- High Needs Safety Valve Update 2025/26 Qtr1
- Schools Funding Update 2026/27
- Updated Scheme for Financing Schools and Schools Financial Procedures

Thursday 13th November 2025 4pm to 5:30pm

- Draft 2026/27 Mainstream Schools Block Budget Modelling
- 2026/27 High Needs Block Funding Update

Tuesday 16th December 2025 2-4pm

- Early Years Budget 2026/27 update
- Dedicated Schools Grant Monitoring 2025/26 Qtr2
- High Needs Safety Valve Update 2025/26 Qtr2

Tuesday 20th January 2026 2-4pm

- Final 2026/27 Mainstream school's budget for agreement
- Final 2026/27 Early Years budget for agreement

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


# Agenda Item 3

<b>Local Authority Name</b>	Hammersmith and Fulham Council
<b>Funding year request relates to</b>	2026/27
<b>Type of disapplication</b>	Schools Block Transfer
<b><i>If a block transfer - the % block transfer against your 26-27 DSG allocation</i></b>	1%
<b><i>If a block transfer - cash value of the block transfer</i></b>	TBC
<b>Was this agreed in your Safety Valve Plan?</b>	Yes
<b>Please provide an explanation for why the disapplication is required. If this request involves a block transfer, please also explain how the additional funding will be used.</b>	<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 significant cost inflation since the Safety Valve agreement. CPI has increased by 26% since April 2020 - March 2025, against a 60% increase in EHCP's during that time in H&amp;F compared to 64% nationally.</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 contain expenditure within our annual allocation. 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 in creating inclusive 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 including the continued delivery of the early intervention speech and language service via the Joint Communication Team. The disapplication is required to create the headroom for the continued investment in these offers, in the context of the broader pressures. Without this investment there is a risk of need escalating to specialist service unnecessarily, resulting in increased costs and pressures. The investment has supported needs being met in a more cost effective way, with H&amp;F now sitting 0.7% below the London % of plans where Speech and Language is the primary need. ~ £595k</p> <p>5) Local area placement sufficiency</p>

	<p>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. The creation of additional Units/ ARPS has and continues to require upfront investment to be affordable; during which time other efficiencies as well as the block transfer are required to mitigate this pressure.</p>
<b>Engagement with the schools forum and consultation with the schools affected</b>	
<b>Has the schools forum been consulted?</b>	Yes disapplication request shared with Schools Forum before decision. There will also be a short consultation with schools later in the Autumn term on budget principles following the release of operational guidance and provisional budgets 2025/26 before final budget model agreed in new year.
<b>Does the schools forum agree with this request?</b>	
<b>Has the schools forum voted?</b>	
<b>Which groups of representatives voted? (maintained schools, academies, etc)</b>	
<b>What was the split in votes?</b>	
<b>What was the date of the schools forum meeting? (DD/MM/YY)</b>	13/11/2025
<b>Was the meeting quorate?</b>	
<b>Please provide link(s)/attach to the minutes showing schools forum agreement, or details of where this can be found in attached documentation.</b>	<a href="https://democracy.lbhf.gov.uk/ieListDocuments.aspx?CId=473&amp;MId=8010&amp;Ver=4">https://democracy.lbhf.gov.uk/ieListDocuments.aspx?CId=473&amp;MId=8010&amp;Ver=4</a>
<b>If this has not yet been discussed with Schools forum, what date will this be? (DD/MM/YY)</b>	N/A See Above
<b>Please provide supporting information and findings following consultation with local schools, including the views of those schools directly</b>	

affected by the proposals	
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	Please see accompanying Equalities Impact Assessment

# Agenda Item 4

	<p align="center"><b>London Borough of Hammersmith &amp; Fulham</b></p> <p align="center"><b>SCHOOLS FORUM</b></p> <p align="center"><b>November 2025</b></p>
<b>Q2 Update: High Needs Block 2025/26</b>	
<b>Open</b>	
<b>Classification</b> - For Scrutiny Review & Comment	
<b>Key Decision:</b> No	
<b>Wards Affected: (All Wards):</b> All	
<b>Accountable Director:</b> Jacqui McShannon, Executive Director of People's Services	
<b>Report Authors:</b> Peter Haylock – Operational Director of Education and SEND Joe Gunning – Head of Programmes, Children's Commissioning	
<b>Purpose of the report</b> 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 2025/26 - Programme Update

Work programme	Assurance Level		
Increase early intervention activity and development of a more robust Local Offer	Update 1 (April)	Update 2 (July)	Update 3 (December)
	Green	Green	RAG
<p>The progress in relation to the Council's Early Intervention approach continues to be sustained.</p> <p>154 requests for Needs Assessments compared to 149 for the same period in 2024. The 2024 outturn showed a -4.6% decrease compared to 2023.</p> <p>Settings continue to be engaged in our SEND Support pathway (ASK SAL) with 161 referrals this academic year to date. Referrers have been supported through a 'Team Around' approach with access to a variety of specialists including Specialist Teachers, Educational Psychologists, and Occupational Therapists.</p>			



Work programme	Assurance Level		
Review of Alternative Provision model	Update 1 (April)	Update 2 (July)	Update 3 (December)
	N/A	N/A	N/A
This workstream is complete.			
Work programme	Assurance Level		
SEND Sufficiency Review and School Organisation Plan	Update 1 (April)	Update 2 (July)	Update 3 (December)
	Amber	Amber	RAG
<p>Progress update:</p> <ul style="list-style-type: none"> <li>Decision complete for the delivery of 32 new specialist places for September 2025: <ul style="list-style-type: none"> <li>A 16 place SEN Unit for pupils with speech, language and communication needs at Ark Burlington Danes Secondary School. The Unit will support 8 pupils in the first year.</li> <li>A 16 place Additionally Resourced Provision for pupils with Autism at Fulham Cross Academy. The ARP will support 8 pupils in the first year.</li> <li>A new Queensmill Key Stage 1 Satellite Provision at Sullivan Primary School, providing up to 20 places from September 2025 and 40 places by September 2026 in the Early Years Foundation Stage (Nursery and Reception) and Key Stage 1 (Year 1 and Year 2). This will provide an improved offer for pupils by providing early intervention in a specialist setting to address the issue of children being retained in Nursery for longer periods. The vision is for this new provision to support pupils with the skills to graduate into the new breadth of mainstream SEN Units at the end of Key Stage 1.</li> </ul> </li> <li>Secure DfE significant change approval for the FCA and Ark BDA Specialist Provision</li> <li>Queensmill consultation currently underway</li> </ul> <p>Next Steps</p> <ul style="list-style-type: none"> <li>Submission of DfE significant change for the new Queensmill Satellite provision</li> <li>Summer works programme to deliver the new specialist provision for September 2025</li> <li>Planning for September 2026 delivery: <ul style="list-style-type: none"> <li>16-place primary SEN Unit to Autism</li> <li>16-place primary SEN Unit to support pupils with speech, language and communication needs</li> <li>Expansion of the Queensmill Key Stage 1 Satellite Provision at Sullivan Primary School to 40 places</li> </ul> </li> </ul>			


<ul style="list-style-type: none"> <li>Expansion of Miles Coverdale SEN Unit for pupils with speech, language and communication needs from 20 to 32 places</li> <li>Formalise the change of designation for the Queen's Manor Primary School Pavilion Unit to support pupils with Autism - 20 places</li> <li>A 16-place Key Stage 2 SEN Unit for pupils with Autism that is closely aligned with Queensmill school providing a stepdown pathway from the Queensmill Key Stage 1 Satellite</li> </ul>			
Work programme	Assurance Level		
Review and reform of outreach services	Update 1 (April)	Update 2 (July)	Update 3 (December)
	N/A	N/A	N/A
This programme is closed.			
Work programme	Assurance Level		
Case Management system	Update 1 (April)	Update 2 (July)	Update 3 (December)
	N/A	N/A	N/A
This programme has been delivered and is complete.			
Work programme	Assurance Level		
Annual Reviews	Update 1 (April)	Update 2 (July)	Update 3 (December)
	Amber	Amber	RAG
<p>Progress Update:</p> <p>Continued effort continues to be made in relation to annual reviews. Of the 1631 young people in scope for an annual review, 63% have been completed in the last year. Of those 70% of settings have returned the report within two weeks, 60% had a decision made within 4 weeks and 58% of plans where there was a decision to amend were issued in 12 weeks (up 8% from Q1). Our 2024 SEN2 performance where the outcome of the review communicated within 4 weeks was 59.8% against a London position of 39.6% and National 44.4%.</p>			
Work programme	Assurance Level		

Preparation for Adulthood	Update 1 (April)	Update 2 (July)	Update 3 (December)
	Amber	Amber	RAG
<p>Progress Update:</p> <p>The Adult Social Care Sufficiency Review is being progressed to support the development of new day opportunities offers within Adult Social Care which provide flexible person-centred care and support that improves health and wellbeing and builds independence.</p> <p>Key activities have included:</p> <ul style="list-style-type: none"> <li>• Mapping of services</li> <li>• Data capture and analysis – need and demand</li> <li>• Contract monitoring data review – impact, outcomes</li> <li>• Establish key stakeholder list</li> <li>• Mapping of drivers and priorities - stat duties and best practice</li> <li>• Service visits</li> <li>• Benchmarking</li> <li>• Analysis of data and information on service need vs demand/capacity and utilisation of services to understand current and project future need</li> </ul>			
Work programme	Assurance Level		
Block Transfer	Update 1 (April)	Update 2 (July)	Update 3 (December)
	Amber	Amber	RAG
1% Block Transfer subject to Schools Forum approval November 2025.			

**Report ends**

# Agenda Item 5

## Agenda Item 5

	<p><b>London Borough of Hammersmith &amp; Fulham</b></p> <p><b>SCHOOLS FORUM</b></p> <p><b>Tuesday 10<sup>th</sup> November 2025</b></p>
<p><b>DEDICATED SCHOOLS GRANT MONITORING QUARTER 1 2025-26</b></p>	
<p><b>Open</b></p>	
<p><b>Wards Affected: (All Wards); All</b></p>	
<p><b>Accountable Director:</b> Jacqui McShannon, Executive Director People's Services</p>	
<p><b>Report Author:</b> Tony Burton Head of Finance for Children's Services and Education</p>	<p>Contact Details: <b>E-mail:</b> <a href="mailto:tony.burton@lbhf.gov.uk">tony.burton@lbhf.gov.uk</a></p>

### Purpose of the report

This report updates forum on:

The 2025/26 Quarter 1 monitoring position on the Dedicated Schools Grant following the retrospective Early Years Dedicated Schools Grant Funding adjustment for 2024/25.

A Technical Adjustment required to the Early Years Dedicated Schools Grant Budget 2025/26 resulting in an increase to the Special Educational Needs Budget allocation.

## 1. Introduction

### 1.1. This paper sets out:

- Current DSG budget 2025-26 after academy recoupment
- Forecast variances in each of the blocks of the Dedicated Schools Grant in 2025/26
- Projected closing balances at 31<sup>st</sup> March 2025 at Quarter 1 2025/26
- Technical adjustment required to the approved Early Years Budget 2025/26

## 2. Summary Position

2.1. Table 1 below shows the high-level position for 2025/26 financial year at quarter 1.

**Table 1 – Block Budgets and Forecast 2025/26**

DSG Allocations stated after deductions for academies recoupment, NNDR and direct funding of High Needs Places by the DfE

**Dedicated Schools  
Grant (DSG)  
Balances by Block**

Figures in red and brackets represent deficit	2025/26 DSG Budget £m	2025/26 Forecast Variance Qtr1 £m	Comments
Schools Block	38.560	0	All funding is forecast to be passported to schools or spent in 2025/26 pending recommendations for allocation of contingency for schools in the financial difficulty later in the year.
Central Services Schools Block	1.939	0	Nil variance after budgeted £0.243m transfer to support HNB expenditure.
High Needs Block	34.987	3.9m (deficit)	In-year deficit forecast of £3.9m in 2025/26 on High Needs versus DSFG funding. This will result in a retained DSG deficit forecast of £6.5m at 31 <sup>st</sup> March 2026.  Note there is significant risk of further pressures as a result of sustained pressures following quarter 1 and to the start of the new academic year 2025/26.
Early Years Block	21.477	0	Note the retrospective adjustment of 2024/25 funding confirmed in Summer 2025 was £45,851 adverse on closing estimates, principally due to a £62,662 reduction in the Maintained Nursery Supplement funding based on final activity.  It is expected this can be contained within 25-26 budgeted contingency.
<b>TOTAL DSG 25-26 Cumulative Deficit 31/03/26</b>	<b>96.964</b>	<b>(3.9) (6.5)</b>	<b>Forecast In-year deficit Forecast retained DSG deficit at year end is £6.5m with significant downside risk</b>

### 3. High Needs Block

- 3.1. The High Needs funding allocation is £34.987m after academy recoupment of £5.085m. Total High Needs funding before recoupment is therefore £40.072m in 2025/26.
- 3.2. The High Needs Block is forecast to overspend by £3.9m versus the funding allocation in 2025/26 at Quarter 1 after the budgeted application of £0.243m transfer from Central Services Schools Block and £1.23m transfer from the Schools Block. This represents an adverse position versus funding on High Needs.
- 3.3. The import/export funding adjustment on the high needs block was confirmed in Summer 2025 for the 2025/26 budget. This has resulted in a reduction in the High Needs funding allocation in 2025/26 of £0.5m which will further increase to £0.566m confirmed in November 2025.
- 3.4. The expenditure for 2025/26 includes the investment in special and SEN unit places in H&F schools from September 2025. This will provide value for money local places in H&F schools from 2025/26 academic year and beyond.
- 3.5. The Quarter 2 High Needs Block 2025/26 update paper provides details of current transformation activity including early intervention activity and the development of a more robust local offer.

### 4. Schools Block and Maintained De-delegation 2025/26

- 4.1. Table 2 shows the Local Authority held budgets for the Schools Block for maintained primary schools and High Needs totalling £38.560m.
- 4.2. A further £85.792m of the Schools Block has been recouped by the ESFA and paid directly to academy and free schools via their GAG funding.

**Table 2 - Schools Block Forecast 2025/26**

	£m 2025/26 Budget	£m 2025/26 Forecast	£m 2025/26 Variance
Schools Block delegated (after academy recoupment) Maintained Primary Only	36.486	36.486	0
Falling Rolls Fund	Nil	Nil	Nil
Maintained schools de-delegated Budget	0.555	0.555	0
Maintained schools Education Functions	0.289	0.289	0
Transfer to High Needs Block	1.230	1.230	0
<b>Total Schools Block received by LBHF</b>	<b>38.560</b>	<b>38.560</b>	<b>0</b>

- 4.3. Although no variances are expected, any underspends on the maintained schools de-delegated budgets and education functions will be confirmed to maintained primary schools in March 2026 prior to the financial year close.
- 4.4. De-delegated budgets include £96,900 for maintained primary schools in financial difficulty. Several maintained primary schools are working on deficit recovery plans and a number of requests for support have been received subject to further deficit recovery planning. A subgroup of the Schools Forum will meet to discuss potential allocations from the fund prior to Schools Forum in the Autumn or Spring Terms of 25/26 academic year.
- 4.5. No falling rolls fund has been provided since 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. Central Services Schools block 2025/26**

- 5.1. The CSSB block is forecast to outturn to budget at £1.939m in 2025/26, including the £0.243m budgeted contribution to the High Needs block.

## **6. Early Years Block 2025/26**

- 6.1. An additional retrospective adjustment of the 2024/25 Early Years Block was made in Summer 2025 by the Department for Education with respect to the maintained nursery supplementary funding based on final activity in 2024/25. It is expected that this will be covered by the 2025/26 contingency budget.

## **7. Early Years Technical Budget Adjustment 2025/26**

- 7.1. Following submission of the 2025/26 Section 251 Budget Statement in Summer 2025, the DfE has informed the council that to be compliant with EY funding guidance a technical adjustment needs to be made to funding allocations to ensure compliance with grant funding conditions.
- 7.2. The original budget model approved at Schools Forum and Cabinet proposed to ringfence separate grant funding received by Primary Schools in 2024/25 following this funding being mainstreamed into the Early Years Block of the DSG from April 2025.
- 7.3. The ringfencing pushed the total supplements as a percentage of funding paid to providers over the 12% limit on 3- and 4-year-old entitlements per grant conditions. This was flagged on the Summer 2025 S251 Budget submission for 2025/26.
- 7.4. When the budget was set it was believed that the 12% limit had not been breached as the calculation included a budgeted direct lump sum funding to maintained nursery schools of £0.574m and direct funding budgeted to

providers of £0.502m for the special educational needs' inclusion fund (SENIF)

- 7.5. The Department of Education have confirmed these elements of the budget paid to providers must be excluded from the baseline calculation of percentage paid through supplements on each of the government funded entitlements.
- 7.6. The supplement percentage is below the 12% limit on the two-year-old and under two-year-old entitlements.
- 7.7. The revised budget ensures compliance with grant conditions by:
  - A reallocation of £135k of the quality supplement to the SENIF budget from 2025/26 financial year
  - This allows for greater investment in inclusion via an increase in the funding for Bands A /B (currently B and C)
  - Further, this allows for the creation of an Exceptional Funding band for children with higher level of need and those whose EHCNA request has been declined.
  - budget will allow for the continued uptake of SEN early intervention support and to support a more complex cohort with early intervention support.

**Report ends**