**Schools Forum Agenda**

Wednesday 15th January 2024, **Microsoft Teams Meeting**

8.20am for an **8.30am start**; comfort break **9.30am**, finish by **10.30am**.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | Author | Voting / Relevance | Page |
| 1 | Apologies for Absence (and substitute notices) | Chair |  | 2 |

**Decision Papers**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 2 | Falling Rolls Fund 2024/25 | Yannick Stupples-Whyley | All schools | 3 |
| 3 | DSG Budget 2025/26 | Yannick Stupples-Whyley | All schools | 9 |

**Forum Business**

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| --- | --- | --- | --- | --- |
| 4 | Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies | Chair | All schools | 32 |
| 5 | Minutes of 27th November 2024 | Chair | All schools | 38 |
| 6 | Minutes Action Log | Yannick Stupples-Whyley | All schools | 57 |

**Information Papers for Discussion**

|  |  |  |  |  |
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| 7 | Third Quarter Budget Update 2024/25 | Yannick Stupples-Whyley | All schools | 58 |
| 8 | Forward Plan | Yannick Stupples-Whyley | All schools | 63 |

**Closing Comments**

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| 9 | Closing Comments | Chair |  | 65 |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 1** |
| Date: 15 January 2025 |  |

Apologies for Absence

Please remember to mute your microphone when you are not speaking.

Anyone attending Schools Forum as an observer must stay silent throughout the meeting.

The professional headteacher representatives for EPHA, ASHE and ESSET are observers unless they are substituting for a headteacher or governor who cannot attend. Whilst observing you can only ask a question via a Forum member.

To ask a question or to comment on a paper please use the raise hand function. If you cannot use this function, please use the meeting chat.

Voting will be undertaken using Polls in the meeting chat. Should polls fail to work the meeting chat will also be used for voting purposes. Please type:

* Agree, if you agree the recommendation,
* Disagree, if you do not agree the recommendation
* Abstain, if you do not wish to vote

The agenda and papers will not be shared on screen.

The meeting will be recorded solely for the purpose of writing the minutes

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 2** |
| Date: 15 January 2025 |  |

**REPORT TITLE: FALLING ROLLS FUND 2024/25**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330 138464); e-mail: yannick.stupples-whyley@essex.gov.uk

**1. Purpose of report**

1.1 To present to Schools Forum the recommendations of the Finance Review Group (FRG) for changes to the criteria of the falling rolls fund, a proposal to review how funding is allocated to schools and to approve a further application for 2024/25.

**2. Recommendations**

2.1 To agree the recommendation of FRG to approve the revised falling roll criteria at 4.8.

2.2 To agree the recommendation of FRG to approve the revised balance criteria at 4.10.

2.3 To agree the recommendation of FRG that a review of how funding is allocated to schools is reviewed at 4.12.

2.4 To agree the recommendation of FRG that Chigwell Primary receives funding from the falling rolls fund at 4.16.

2.5 To agree the recommendation of FRG to approve the funding shown in Table 2 at 5.2.

###### 3. Relevant Schools Forum Power and Responsibility

3.1 **Table 1** is an extract from the Schools Forum Operational and Good Practice Guide (September 2018), which sets out the role of the Authority, Schools Forum and the Secretary of State for the Falling Rolls Fund.

|  |  |  |  |
| --- | --- | --- | --- |
| Function | Local Authority | Schools Forum | DfE |
| Central spend on and the criteria for allocating funding for [falling rolls](#_Falling_rolls_fund) where growth in pupil numbers is expected within three years. | Proposes | Decides | Adjudicates where schools forum does not agree local authority proposal |

###### 4. Background

4.1 Schools Forum agreed the criteria for the falling rolls fund at the January 2023 meeting and the balances criteria at the May 2023 meeting.

4.2 The requirement for schools to be judged good or outstanding by Ofsted has been removed from 1st April 2024.

4.3 There are 10 schools currently within the falling rolls fund for 2024/25.

* Prettygate Infant School
* St Mary’s Primary, Hatfield Broad Oak
* Clavering Primary
* Wethersfield Primary
* Finchingfield Primary
* Tollesbury Primary
* St John the Baptist, Pebmarsh
* St Mary’s Primary, Ardleigh
* Stourview CE Primary Academy (Mistley Norman)
* Dr Walkers Primary

4.4 Schools Forum were made aware at the meeting on 10 July 2024 that there could be further applications from 3 academies if their actual balances at 31st August 2024 met the balance criteria.

4.5 Stourview Primary’s (formerly Mistley Norman Primary) application was approved at November’s Forum, Chigwell Primary has submitted their closing balance at 31st August 2024 and there has been no balance update from The Alderton Junior School.

4.6 At the last meeting Forum agreed the recommendation that FRG undertakes a review of the falling rolls fund criteria. FRG had raised concern that larger schools were receiving high allocations through the falling roll fund, where these schools should be able to cope better from a fall in pupil numbers.

4.7 The current falling roll criteria is

* The NOR must have fallen by 4% in both previous years for primary schools with 210 or fewer pupils; or
* The NOR must have fallen by 7% in both previous years for primary schools with greater than 211 pupils up to 420 pupils; or
* The NOR must have fallen by 10% in both previous years for primary schools with more than 420 pupils and secondary schools.

4.8 FRG recommends the above criteria are amended as follows:

* The NOR must have fallen by 4% in both previous years for infant schools with 90 pupils or fewer, junior schools with 120 pupils or fewer and primary schools with 210 pupils or fewer; or
* The NOR must have fallen by 7% in both previous years for infant schools with pupil numbers between 91 and 180, junior schools with pupil numbers between 121 and 240 and primary schools with pupil numbers between 211 and 420; or
* The NOR must have fallen by 10% in both previous years for infant schools with more than 180 pupils, junior schools with more than 240, primary schools with more than 420 pupils and all secondary schools.

4.9 The current balance criteria is as follows:

|  |  |
| --- | --- |
|  | Balance Criteria |
| Primary schools 210 pupils or fewer. | The balance should be less than or equal to the average balance for small schools or 8% of the relevant budget share, whichever is the greater. |
| Primary schools with 211 pupils or greater. | The balance should be less than or equal to 8% of the relevant budget share. |
| Secondary schools | The balance should be less than or equal to 5% of the relevant budget share. |

4.10 FRG recommends that the balance criteria should be amended in line with the proposed changes at 4.8.

|  |  |
| --- | --- |
|  | Balance Criteria |
| Infant schools with 90 pupils or fewer Junior schools with 120 pupils or fewer Primary schools with 210 pupils or fewer | The balance should be less than or equal to the average balance for small schools or 8% of the relevant budget share, whichever is the greater. |
| Infant schools with 91 pupils or greater  Junior schools with 121 pupils or greater  Primary schools with 211 pupils or greater | The balance should be less than or equal to 8% of the relevant budget share. |
| Secondary schools | The balance should be less than or equal to 5% of the relevant budget share. |
| Trusts that Pool Balances – average balance per sector will be calculated pro-rata basis using pupil numbers. | The overall Trust balance as a percentage of the total budget should be less than less than 5% for secondary schools and 8% for primary schools. |

4.11 The recommended changes will be introduced from April 2025.

4.12 FRG is concerned that the published admission number (PAN) for some schools does not reflect the actual intake. Therefore, using PAN to calculate the allocations to schools may result in some schools receiving more funding than a school requires. FRG recommends a review of the methodology for distributing funding to schools, which will be brought to the May meeting.

4.13 Applications for falling rolls funding have been received from Chigwell Primary School and Hilltop Infant School.

4.14 Chigwell Primary has a PAN of 30 pupils but also admits an additional 15 pupils into Year 3. The school has requested the additional intake at Year 3 is included in the calculation of funding. FRG reviewed the year group numbers in Annex A and could not clearly see that the Year 3 intake increased by 15 pupils. This raised concern with the school’s PAN and therefore the recommendation is to only consider the reception intake in line with other schools.

4.15 FRG discussed the application of Hilltop Infant and has requested the Authority gains further information on staffing structures from the school. The school will be invited to the next FRG.

4.16 FRG recommends that Chigwell Primary receives funding of **£31,973** for 2024/25, which is based only on the reception PAN.

**5. Financial Implications**

5.1 Schools Forum approved a budget of **£836,000** for 2024/25.

5.2 **Table 2** shows the funding that will be paid to each school if Schools Forum approves the schools listed at 4.14

|  |  |  |
| --- | --- | --- |
| School | 2024/25  £ | 2025/26  £ |
| Clavering Primary | 113,683 | 120,748 |
| Finchingfield Primary | 88,815 | 94,334 |
| Prettygate Infant | 145,656 | 154,708 |
| St Mary’s Primary, Hatfield Broad Oak | 88,815 | 0 |
| Wethersfield Primary | 42,631 | 45,280 |
| Tollesbury Primary | 28,421 | 30,187 |
| St John the Baptist Primary | 35,526 | 37,734 |
| St Mary’s Primary Ardleigh | 28,421 | 30,187 |
| Stourview CE Primary Academy | 56,841 | 60,374 |
| Dr Walker’s Primary | 110,130 | 116,974 |
| Total | **738,938** | **690,527** |
| Chigwell Primary | 31,973 | 33,960 |
| Total | **770,911** | **724,487** |

5.3 The required funding of **£771,000** is less than the approved budget of **£836,000**. The remaining **£65,000** will be carried forward to 2025/26.

**6. Other Resource Implications**

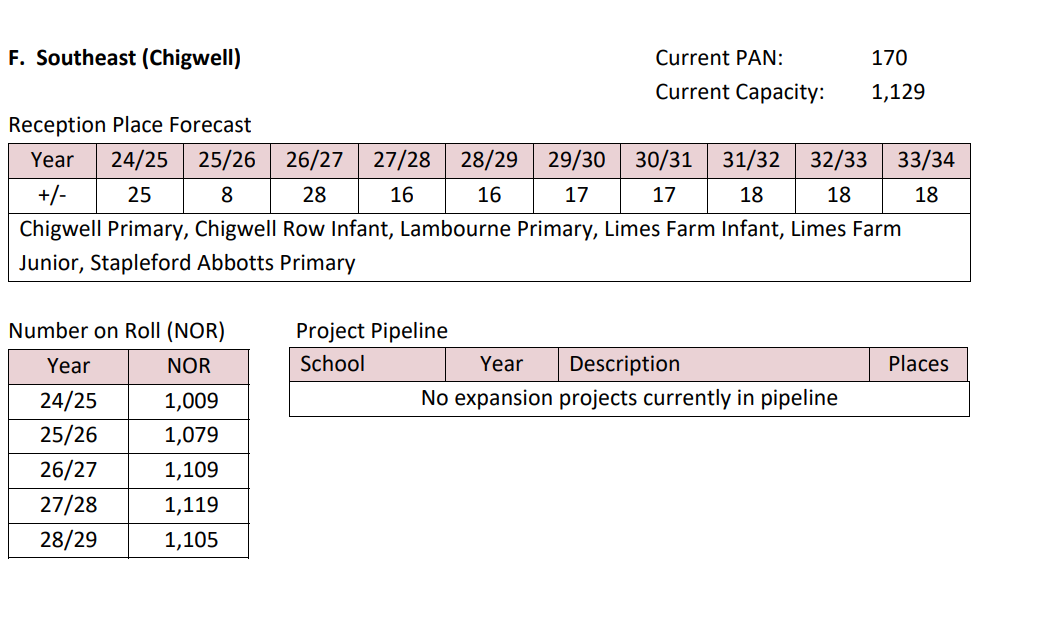
**7. Consultation with stakeholders**

**8. Background / Supporting papers.**

8.1 Annex A – School Applications

**Chigwell Primary**





The school meets the consecutive two years of falling rolls of 4% or greater. The roll must increase by Year 3 (October 2025) and in subsequent years, which is demonstrated in the school’s pupil forecast above.

The school has an additional intake of 15 at Year 3 and has requested this is taken into account in calculating the funding.

The Trust has advised the actual balance at 31st August 2024 is a deficit of £143,000 and therefore the school meets the balance criteria.

The funding based on pupil forecasts is:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Year | Including Year 3 Intake Pupils | £ | Only using Reception Intake  Pupils | £ |
| 2024/25 | 40 | 142,104 | 9 | 31,973 |
| 2025/26 | 40 | 142,104 | 9 | 31,973 |
| 2026/27 | 40 | 142,104 | 9 | 31,973 |
| 2027/28 | 40 | 142,104 | 9 | 31,973 |
| 2028/29 | 40 | 142,104 | 9 | 31,973 |

FRG recommends that Chigwell Primary receives falling rolls funding in 2024/25 but only based on the reception intake.

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 3** |
| Date 15 January 2025 |  |

**REPORT TITLE: DEDICATED SCHOOLS GRANT BUDGET 2025/26**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330 138464); e-mail: yannick.stupples-whyley@essex.gov.uk

**1. Purpose of report**

* 1. To update Schools Forum of the funding settlement for 2025/26.
  2. To update Schools Forum on the assumptions built into the budget.
  3. To seek School’s Forum agreement of the relevant elements of the Dedicated Schools Grant budget for 2025/26.

**2. Recommendations**

2.1 To note the DSG Settlement for 2025/26 at 4.3;

2.2 To note the funding for the PFI Affordability Gap at 8.2

2.3 To note the total delegation for primary and secondary schools at 9.8

2.4 To note the proposed allocation of the High Needs Block at 12.1

2.5 To note the risks and opportunities at 13.1

2.6 To agree the funding for the Growth Fund at 5.10

2.7 To agree the funding for the Falling Rolls Fund at 7.5

2.8 To agree to cap gains at 0.5% to meet the requirements of NFF for 2025/26 at 9.6

2.9 To agree the use of the use of an exceptional premises factor to recover the Authority’s costs of buying out the former Tendring PPP contract at 9.2

2.10 To agree the funding rates for early years providers at 9.10

2.11 To agree that £1m of the Early Years Inclusion Fund is funded from the Early Years surplus balance at 9.13, and

2.12 To agree the central expenditure for the Central School Services Block and Early Years Block at 11.1

###### 3. Relevant Schools Forum Power and Responsibility

3.1 **Table 1** is an extract from the Schools Forum Operational and Good Practice Guide (September 2018), which sets out the role of the Authority, Schools Forum and the Secretary of State in setting the Schools Budget.

|  |  |  |  |
| --- | --- | --- | --- |
| Function | Local authority | Schools forum | DfE role |
| Formula change (including redistributions) | Proposes and decides | Must be consulted – consulted in Sept / Nov | Checks for compliance with regulations |
| Movement of up to 0.5% from the schools block to other blocks | Proposes | Decides – approved 0.5% Nov 27th | Adjudicates where schools forum does not agree local authority proposal |
| Minimum funding guarantee (MFG) | Proposes any exclusions from MFG for application to DfE. | Gives a view – N/A | Approval to application for exclusions |
| De-delegation for mainstream maintained schools for:   * contingencies * administration of free school meals * insurance * licences/subscriptions * staff costs – supply cover * support for minority ethnic * pupils/underachieving groups * behaviour support services * library and museum services * School improvement | Proposes | Maintained primary and secondary school member representatives will decide for their phase. Middle schools are treated according to their deemed status – agreed 25 Sept | Will adjudicate where schools forum does not agree local authority proposal |
| General Duties for maintained schools   * Contribution to responsibilities that local authorities hold for maintained schools | Proposes | Would be decided by the relevant maintained school members (primary, secondary, special and PRU). – agreed 25 Sept | Adjudicates where schools forum does not agree local authority proposal |
| Central spend on and the criteria for allocating funding from:   * funding for significant pre-16 [pupil growth](#_Growth_Fund), including new schools set up to meet basic need, whether maintained or academy * funding for [falling rolls](#_Falling_rolls_fund) where growth in pupil numbers is expected within three years | Proposes | Decides – 5.10 and 7.5 | Adjudicates where schools forum does not agree local authority proposal |
| Central spend on:   * early years block provision funding to enable all schools to meet the infant class size requirement. * admissions * servicing of schools forum * Contribution to responsibilities that local authorities hold for all schools | Proposes | Decides – 11.1 | Adjudicates where schools forum does not agree local authority proposal |
| Central spend on:   * capital expenditure funded from revenue – projects must have been planned and decided on prior to April 2013 so no new projects can be charged. * contribution to combined budgets – this is where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources. * existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged) * prudential borrowing costs – the commitment must have been approved prior to April 2013 | Proposes up to the value committed in the previous financial year and where expenditure has already been committed. | Decides for each line – 11.1 | Adjudicates where schools forum does not agree local authority proposal |
| Central spend on:   * high needs block provision * central licences negotiated by the Secretary of State | Decides | None, but good practice to inform forum – 12.1 | None |

###### 4. Background

4.1 The School Funding Settlement for 2025/26 was announced on the 18th December 2024.

4.2 The total increase in funding is **£4.3bn** at a national level, of which **£2bn** is for Early Years, **£1.3bn** for Schools and **£1bn** for High Needs.

4.3 **Table 2** shows the funding settlement for each block. It can be seen that the increase for 2025/26 from the revised 2024/25 baseline is **£118m** (7.2%).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Schools Block  £m | Central School Services Block  £m | High Needs Block  £m | Early Years Block  £m | Total  £m |
| 2024/25 | 1,159.7 | 11.8 | 239.1 | 154.4 | 1,564.9 |
| Pay / Pension Grants | 66.6 | 0.5 | 0 | 0 | 67.1 |
| Revised 2024/25 Baseline | 1,226.3 | 12.3 | 239.1 | 154.4 | 1,632.1 |
| 2025/26 | **1,250.9** | **11.9** | **260.9** | **226.4** | **1,750.1** |
| Increase / (Decrease) | 24.6 | (0.4) | 21.8 | 72.0 | 118.0 |
| % Change | 2.0 | (3.3) | 9.1 | 46.6 | 7.2 |

4.4 The DSG allocation remains provisional as the Early Years Block is funded 5/12ths on the January 2025 Census and 7/12ths on the January 2026 Census. The High Needs Block allocation is also provisional as it is subject to any changes to the Import / Export adjustment which is based on the January 2025 Census.

**Schools Block**

4.5 **Figure 1** shows how the Schools Block is calculated.

4.6 The primary unit of funding is **£5,379.12** and the secondary unit of funding is **£6,984.41** for 2025/26. These rates are multiplied by the respective pupil numbers from the October 2024 Census.

4.7 Premises funding is provided at the level of funding delegated to schools in 2024/25, with the exception of PFI funding where the baseline will continue to be uplifted in line with RPIX inflation.

4.8 The growth fund is calculated at the middle layer super output area (MSOA). For each school, the October 2023 census is deducted from the October 2024 census. A total is calculated for each MSOA for primary and secondary and where the total is positive, growth funding is allocated.

4.9 The falling rolls fund is calculated at the middle super output area (MSOA). For each school, the October 2023 census is deducted from the October 2024 census. A total is calculated for each MSOA for primary and secondary and where the total is a reduction of at least 10%, falling rolls funding is allocated for that MSOA.

4.10 Changes for 2025/26:

* The 2024/25 allocations for the teachers’ pay grant, the teachers’ pension employers contribution grant and the core schools budget grant have been rolled into DSG.
* Amending the private finance initiative (PFI) factor such that the baseline for calculating the 2025/26 NFF PFI allocation will be the lower of the LA 2024/25 PFI premises factor and the school’s NFF PFI funding for 2024/25.
* Technical changes to the split site factor where a split site is created from schools merging or amalgamating. Split site funding will not come into effect until the lump sum protection has ceased (usually 2 years)

4.11 The **£24.6m** increase from the rebased 2024/25 baseline is due to the following:

* Increase to NFF factors **£10.5m**
* Increase in funding for additional 5 months of the core schools budget grant **£16.4m**
* Reduction in pupil numbers as primary numbers have decreased by 323 pupils, secondary numbers have increased by 187 pupils resulting in an overall reduction of 136 pupils. (**£434,000)**
* Increase in premises funding **£727,000**
* Decrease in growth funding (**£2.5m)**
* Increase in falling rolls funding **£150,000**

**Central School Services Block**

4.12 **Figure 2** shows how the Central School Services Block (CSSB) is calculated.

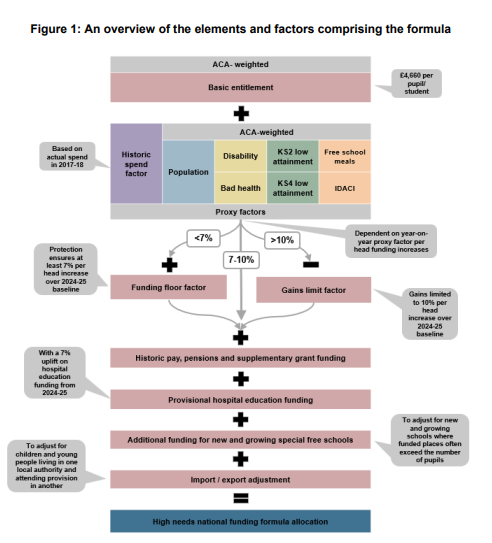
4.13 The ongoing responsibilities element of CSSB is funded on a per pupil amount and includes the central services for all schools element of the former Education Services Grant. Funding increases by **£352,000** due to additional funding for central licences for schools.

4.14 The historic commitments element was **£3.8m** in 2024/25. The DfE are now winding down historic commitments and reduce the allocation by 20% each year. The allocation for 2025/26 is **£3m** a reduction of **£761,000**.

4.15 Overall there is a reduction of **£409,000**.

**High Needs Block**

4.16 **Figure 3** shows how the High Needs Block is calculated.



4.17 The High Needs Block has increased by **£21.8m** due to:

* An additional 289 special school places **£1.4m**
* Allocation from **£1bn** increase **£20.4m**

**Early Years Block**

4.18 **Figure 4** shows how the Early Years Block is calculated

* With the exception of the Disability Access Fund, all elements are funded by multiplying the total part-time equivalent (PTE) by 15 hours by 38 weeks by the hourly rate. A child attending 15 hours per week is 1 PTE.

4.19 **Table 3** shows the uplift in the hourly rates payable to Essex for 2025/26

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | 2024/25  £ | 2025/26  £ | Increase  £ | Increase  % |
| Under 2s | 10.75 | 11.11 | 0.36 | 3.3 |
| 2 Year Olds | 7.91 | 8.20 | 0.29 | 3.7 |
| 3 & 4 Year Olds | 5.61 | 5.87 | 0.26 | 4.6 |
| Maintained Nursery Supplement | 4.64 | 5.27 | 0.63 | 13.6 |
| EY Pupil Premium | 0.68 | 1.00 | 0.32 | 47.1 |
| Disability Access Fund | 910.00 | 938.00 | 28.00 | 3.9 |

4.20 The changes for the Early Years Block for 2025/26 are:

* The 15 hours entitlement for eligible working parents of children under 2 will be extended to 30 hours from September 2025.
* The 15 hours entitlement for eligible working parents of 2 year old children will be extended to 30 hours from September 2025.
* The minimum pass-through requirement for local authorities will increase from 95% to 96%.
* Local authorities are required to announce their funding rates to childcare providers by 28 February 2025.

4.21 The provisional increase of **£72m** is due to:

* Increase in 3&4YO rate **£4.4m**
* Increase in 2YO rate **£444,000**
* Increase in 2YO working parent offer to 30 hours **£20.2m**
* Increase in Under 2s working parent offer to 30 hours **£46.4m**
* Increase in pupil premium rate **£410,000**
* Increase in disability access fund rate **£86,000**
* Increase in MNS rate **£62,000**

**Pupil Premium**

4.22 Pupil premium rates were due to be notified before Christmas, but have been delayed by DfE. Forum will be notified of the new rates at the next meeting.

**Benchmarking**

4.23 **Table 4** shows how Essex benchmarks against other local authorities for each block.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Schools Block | Central School Services Block | High Needs Block | Early Years Block |
| Funding per pupil | 6,153.09 | 43.33 | 839.96 | 6,259.33 |
| Rank (out of 151) | 127 | 102 | 127 | 101 |
| Quartile | 4 | 3 | 4 | 3 |

4.24 The funding per pupil is calculated as follows:

* Total Schools Block divided by total primary and secondary pupils.
* Funding rate per pupil for ongoing commitments within the central school services block.
* Total High Needs Block divided by total 2-18 population.
* Total Early Years Block divided by total part time equivalents for 3&4 year olds, 2 year olds and under 2s.

4.25 Essex is within the lowest 40 funded authorities for both the Schools Block and High Needs Block and within the lowest 50 funded authorities for the Central School Services Block and the Early Years Block. Detailed analysis will be undertaken to fully assess why Essex is a poorly funded authority.

**5. Growth Fund**

5.1 The Authority has a statutory duty to provide sufficient school places.

5.2 The Growth Fund is known as explicit growth and provides funding for basic need growth where schools are expanding. It also provides funding for bulge classes where temporary growth is required, for furniture and equipment for new and expanding schools and for the KS1 class size contingency.

5.3 The funding rates for 2025/26 have increased with primary growth being funded **£1,570** per pupil, an increase of **£20** per pupil and secondary growth is funded at **£2,350** per pupil, an increase of **£30** per pupil. For any new schools that appear for the first time on the October 2024 census, local authorities receive an allocation of **£77,225**, an increase of **£1,030** per new school. An area cost adjustment is applied.

5.4 For each local authority, schools are allocated into middle super output areas (MSOAs). For each school, the October 2023 census is deducted from the October 2024 census. A total is calculated for each MSOA for primary and secondary and where the total is positive growth funding is allocated. **Table 5** shows an example of how this works at MSOA level.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| MSOA | School | Oct 24 | Oct 23 | Primary Growth | Secondary Growth |
| Basildon 1 | Buttsbury I | 348 | 360 | -12 | 0 |
|  | Buttsbury J | 511 | 505 | 6 | 0 |
|  | Mayflower High | 1,331 | 1,330 | 0 | 1 |
|  |  |  |  | **-6** | **1** |
|  |  |  |  |  |  |
| Basildon 15 | The Willows P | 617 | 621 | -4 | 0 |
|  | Fairhouse P | 412 | 403 | 9 | 0 |
|  | De La Salle | 771 | 757 | 0 | 14 |
|  |  |  |  | **5** | **14** |

5.5 The MSOA Basildon 1 would generate no primary growth funding as there is no growth but would generate **£2,350** for secondary growth. Basildon 15 would generate **£7,850** for primary growth for the net growth of 5 pupils and **£32,900** for secondary growth for the net growth of 14 pupils.

5.6 The allocation for Essex for 2024/25 is **£4.5m**, which is a decrease of **£2.5m** from 2024/25, as there is an overall reduction in pupil numbers compared to 2024/25. The DfE funds the summer term payments for academies and therefore reimburses local authorities. The expected payment for 2025/26 is **£878,000**, so the total available for the Growth Fund is **£5.4m** for 2025/26.

5.7 The growth funding arrangements provide certainty for schools that are expanding at the request of the Authority and enable the Authority and schools to collaboratively provide enough school places to accommodate local need. Without the growth fund in place there is increased risk of insufficient additional places being commissioned, increased home to school transport costs, increased incidence of pupils having to travel long distances to get to school, increased number of school admission appeals with costs implications for schools, increased use of the fair access protocol and increased class sizes.

5.8 A prime example of this would be where an area requires an additional 10 Reception places, enough additional demand to warrant an additional class to avoid infant class size limits being breached, or Reception age pupils transported a long distance to access a school place (with the associated cost). Without growth funding to run the additional class while it works its way through the school, the school would have to take on an operational deficit for that class, which would be unfair on that school, and most schools would be unwilling or unable to agree to this, and so would not agree to admit additional children.

5.9 **Table 6** shows the growth fund requirement for 2025/26

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2024/25  £000 | 2025/26  £000 | Difference  £000 |
| Planned Growth | 5,020 | 3,277 | (1,743) |
| Furniture & Equipment | 1,185 | 1,108 | (77) |
| KS1 Class Size | 800 | 800 | 0 |
| Total | **7,005** | **5,185** | **(1,820)** |

5.10 The growth fund request is **£5.2m**, which is **£234,000** lower than the 2025/26 allocation. The majority of the surplus, **£156,000** will be transferred to the Falling Rolls Fund to fund the shortfall at 7.5.

**6. Varying Pupil Numbers**

6.1 Varying pupil numbers is known as implicit growth and is an alternative method of funding significant change in pupil numbers.

6.2 **Table 7** shows the number of growth places funded by varying pupil numbers.

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2024/25  Places | 2025/26  Places | Difference |
| Primary | 605 | 487 | (118) |
| Secondary | 225 | 175 | (50) |
| Total | **830** | **662** | **(168)** |

6.3 The number of places funded on estimated numbers decreases due to 7 primary and 1 secondary schools coming to the end of their growth period in 2024/25.

6.4 Varying pupil numbers has a negative impact on the value of the basic entitlement as more pupils are funded than recorded on the October 2024 Census. If no schools were funded on estimated numbers the primary basic entitlement would be **£15.47** per pupil higher and the KS3 basic entitlement would be **£18.17** per pupil higher. However, the Authority would need to seek an additional **£2.8m** for the Growth Fund.

**7. Falling Rolls Fund**

7.1 The Falling Rolls Fund provides funding for schools that have a temporary reduction in pupil numbers.

7.2 The falling rolls allocation for 2025/26 is **£568,000**, an increase of **£150,000**.

7.3 There are currently 11 primary schools within the Falling Rolls fund. **Table 8** shows the budget requirement for 2025/26.

|  |  |
| --- | --- |
| School | £ |
| Clavering Primary | 120,748 |
| Finchingfield Primary | 94,334 |
| Prettygate Infant | 154,708 |
| St Mary’s Primary, Hatfield Broad Oak | 0 |
| Wethersfield Primary | 45,280 |
| Tollesbury Primary | 30,187 |
| St John the Baptist Primary | 37,734 |
| St Mary’s Primary Ardleigh | 30,187 |
| Stourview CE Primary Academy | 60,374 |
| Dr Walker’s Primary | 116,974 |
| Chigwell Primary | 33,960 |
| Total | **724,487** |

7.4 In accordance with the falling rolls fund criteria, the October 2024 Census must be higher than the October 2023 Census for Clavering Primary, Finchingfield Primary, Prettygate Infant, St Mary’s Primary, Hatfield Broad Oak and Wethersfield Primary as 2025/26 is Year 3 for these schools. St Mary’s Primary, Hatfield Broad Oak number on roll has decreased and therefore the school no longer qualifies for falling rolls funding.

7.5 The budget requirement of **£724,000** is higher than the **£568,000** allocation. It can be seen in 5.10 that there is **£234,000** surplus funding in the Growth Fund and it is proposed to fund the **£156,000** shortfall from this.

7.6 The Authority has compared the October 2024 census to the October 2023 census and **16** primary schools meet the falling roll criteria. The Authority will contact each school. Of the **16** schools currently **5** schools meet the balances criteria. Should all **5** schools qualify the forecast cost is an additional **£449,000**. The cost of any new schools will be funded by the Schools Block surplus balance, which is forecast to be **£1.3m** at 31st March 2025 as shown in Agenda Item 7. The surplus balance within the Schools Block will be held to fund shortfalls in the growth fund and the falling rolls fund.

**8. PFI Affordability Gap**

8.1 Indicative school contributions for facilities management costs for 2024/25 are shown in **Table 9**.

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2024/25  £000 | 2025/26  £000 | Difference  £000 |
| BSF PFI | 3,404 | 3,497 | 93 |
| Clacton PFI | 3,095 | 2,946 | (149) |
| Debden PFI | 788 | 841 | 53 |
| Total | **7,287** | **7,284** | **(3)** |

8.2 The affordability gap is the amount left to fund once grant income and school contributions have been deducted. Under the School and Early Years Finance (England) Regulations the affordability gap is delegated to the relevant schools through the funding formula. It is excluded from the calculation of the Minimum Funding Guarantee (MFG) to ensure that no school gains or is financially disadvantaged by any change in the affordability gap from one year to the next. **Table 10** shows the affordability gap for each scheme.

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2024/25  £000 | 2025/26  £000 | Difference  £000 |
| BSF PFI | 1,561 | 1,586 | 25 |
| Clacton PFI | 1,395 | 1,521 | 126 |
| Debden PFI | 1,650 | 2,538 | 888 |
| Total | **4,607** | **5,645** | **1,039** |

8.3 The large increase in the affordability gap for the Debden PFI contract results from the high inflation in 2022/23 and 2023/24 which has depleted the PFI reserve. As the contract ends in 2026/27 there are insufficient years left to be able to smooth the large increase across a number of years to mitigate the impact on schools.

**9. School Funding 2025/26**

**Exceptional Premises Factor**

9.1 The exceptional premises factor is used to fund the Authority’s costs of buying out the former Tendring PPP contract which was approved by Schools Forum in May 2018. Under school funding regulations the funding must be allocated to the 12 schools and then paid back to the Authority.

9.2 The Authority is required to reapply for the disapplication to use an exceptional premises factor for 2025/26 and is required to consult with Schools Forum on the proposal The total funding is £2.9m which is the same value as the previous year. The disapplication was approved in December.

**Delegated Budgets**

9.3 The Authority is required to submit the Authority Proforma Tool which sets out how schools will be funded in 2025/26 to the Education and Skills Funding Agency (ESFA) by 23rd January 2025. Once it has been submitted it can only be changed at the request of the ESFA. There is a small risk that the figures in Table 13 could change but overall delegation will remain the same.

9.4 In 2023/24 the Essex Formula fully transitioned to the Schools National Funding Formula. Essex mirrors NFF in all factors except the key stage 4 basic entitlement. An authority is classed as mirroring NFF if the value of their local factors are +/- 2.5% of the ACA uplifted NFF value. The key stage 4 basic entitlement is higher than NFF and is therefore subject to a 10% reduction to move it closer to NFF.

9.5 At the last meeting Schools Forum approved the Authority uses any of the following mechanisms as needed to meet the requirements of NFF for 2025/26.

* To adjust additional needs factors towards the minimum values allowed, if required to meet the requirements of NFF for 2025/26.
* To adjust the lump sum towards the minimum value allowed, if required to meet the requirements of NFF for 2025/26.
* To adjust the KS3 / KS4 basic entitlement towards the NFF weighting, if the KS4 basic entitlement is higher than the permitted value.
* To adjust the value of MFG towards the minimum value allowed, if required to meet the requirements of NFF for 2025/26.
* To use capping of schools gains, if required to meet the requirements of NFF for 2025/26.
* To increase the London weighting multiplier by the minimum amount required.

9.6 To adhere to the requirements of NFF for 2025/26 the Authority has been required to make the following changes:

* To fund all factors, with the exception of the basic entitlement, at the minimum value allowed for 2025/26.
* The KS3 / KS4 basic entitlement weighting has moved from 1.01:1.183 to 1:1.15.
* MFG has been set at -0.5% which is the lowest level allowed.
* Gains have been capped at 0.5%.
* London weighting has moved to 1.0192, the minimum value allowed for 2025/26.

9.7 The changes implemented at 9.6 allows the Authority to fully fund the minimum per pupil levels. Without making the above changes the Authority would have needed to seek a disapplication to fund MPPL at a lower level.

9.8 **Table 11** shows the total funding to be delegated to primary and secondary schools for 2025/26.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Primary  £ | Secondary  £ | Total  £ |
| Schools Block 2025/26 | 651,783,285 | 599,127,921 | 1,250,911,205 |
| Growth Fund | (2,077,095) | (2,463,381) | (4,540,476) |
| Falling Rolls Fund | (567,550) | 0 | (567,550) |
| Premature Retirement Costs (1) | (398,399) | (812,262) | (1,210,661) |
| HNB Transfer (2) | (7,324,302) | (5,184,810) | (12,509,112) |
| Funding Differential (3) | 207,262 | (207,262) | 0 |
| Total | **641,623,611** | **590,459,796** | **1,232,083,407** |

1. – Agreed by Schools Forum 25 September 2024
2. – Schools Forum approved 0.5% and supported the 1% disapplication request to the Secretary of State on 27 November 2024. Table 11 is based on a 1% transfer however the decision of the Secretary of State is still outstanding.
3. - Adjustment to keep the primary / secondary funding differential at 1:1.30

9.9 Delegation increases from **£1.218bn** in 2024/25, to **£1.232bn** in 2025/26, an increase of **£14.5m** (1.2%).

**Early Years Funding Rates 2025/26**

9.10 Paragraphs 4.18 to 4.21 cover the funding for the Early Years Block and the changes for 2025/26.

9.11 **Table 12** shows the proposed hourly rates that will be funded in 2025/26.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | 2024/25  £ | 2025/26  £ | Difference  £ | Difference  % |
| Under 2s – working parents | 10.73 | 10.92 | 0.19 | 1.8 |
| 2YO - FRAS[[1]](#footnote-2) | 8.00 | 8.16 | 0.16 | 2.0 |
| 2YO – working parents | 7.85 | 7.96 | 0.11 | 1.4 |
| 3&4YO | 5.23 | 5.54 | 0.31 | 5.9 |
| Maintained Nursery Supplement | 4.64 | 5.27 | 0.63 | 13.6 |
| Early Years Pupil Premium | 0.68 | 1.00 | 0.32 | 47.1 |
| Disability Access Fund | 910.00 | 938.00 | 28.00 | 3.1 |

9.12 The Authority has split the retained costs (**£3.7 million**) proportionately across each funding block. The Authority is provisionally passporting a minimum **97.5**% of each funding block.

9.13 Schools Forum agreed to transfer all expenditure for the Early Years Inclusion Fund from the High Needs Block to the Early Years Block at the meeting of 25 September 2024. The Early Years Inclusion Fund is estimated at **£3m** for 2025/26, so to mitigate the impact on the sector it is proposed to fund **£2m** from the 2025/26 Early Years Block allocation and **£1m** from the surplus balance. In 2026/27 it will be fully funded from the Early Years Block allocation. It can be seen in Agenda Item 7, that the current forecast surplus balance is **£8.2m**.

9.14 The Early Years Block provisional allocation is based on the January 2024 census. Actual funding for 3&4 year olds and 2 year olds from deprived backgrounds will be calculated on the January 2025 census (5/12ths) and January 2026 census (7/12ths). It may be necessary to adjust the rates in Table 13 once the January 2025 census is published in July.

9.15 Funding for 2 year olds from working families and under 2s will continue to be based on termly census returns in 2025/26.

**10. Essex Formula for Funding Schools**

10.1 **Table 13** shows how the funding is distributed across each factor for 2025/26.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Primary 2024/25 | Primary 2025/26 | Primary Difference | Secondary 2024/25 | Secondary 2025/26 | Secondary Difference |
| Deprivation - FSM | 11,806,718 | 11,588,938 | (217,780) | 8,105,564 | 8,427,201 | 321,637 |
| Deprivation - FSM6 | 20,890,754 | 26,007,670 | 5,116,916 | 22,772,364 | 29,813,716 | 7,041,352 |
| Deprivation - IDACI | 14,428,775 | 13,948,519 | (480,256) | 14,975,285 | 14,633,416 | (341,869) |
| Prior Attainment | 39,698,725 | 39,851,720 | 152,995 | 31,232,842 | 30,315,469 | (917,373) |
| Mobility | 1,449,669 | 1,449,671 | 2 | 170,944 | 278,555 | 107,611 |
| EAL | 4,956,401 | 5,130,982 | 174,581 | 2,369,611 | 2,701,988 | 332,377 |
| Lump Sum | 60,185,470 | 63,187,566 | 3,002,096 | 10,926,462 | 11,501,557 | 575,095 |
| Sparsity | 2,020,101 | 2,060,837 | 40,736 | 44,409 | 58,219 | 13,810 |
| Split Site | 190,759 | 186,978 | (3,781) | 296,587 | 343,488 | 46,901 |
| Rates | 5,765,115 | 6,420,740 | 655,625 | 2,625,997 | 2,529,268 | (96,729) |
| PFI | 0 | 0 | 0 | 4,607,254 | 5,645,304 | 1,038,050 |
| Exceptional Premises – Tendring PPP Buyout | 2,912,640 | 2,912,640 | 0 | 0 | 0 | 0 |
| Exceptional Premises – Amalgamating Schools Lump Sum | 188,852 | 198,792 | 9,940 | 0 | 0 | 0 |
| Capping and Scaling | 0 | (351,168) | (351,168) | 0 | 0 | 0 |
| London Weighting | 3,535,553 | 4,132,608 | 597,055 | 3,192,736 | 3,767,299 | 574,563 |
| Minimum per Pupil | 7,325,716 | 10,691,072 | 3,365,356 | 1,340,316 | 2,315,148 | 974,832 |
| MFG | 243,038 | 3,955,903 | 3,712,865 | 82,600 | 3,364,815 | 3,282,215 |
| Basic Entitlement | 425,220,387 | 450,250,143 | 25,029,756 | 447,438,882 | 474,764,353 | 27,325,471 |
| Total | **600,818,673** | **641,623,632** | **40,804,938** | **550,181,853** | **590,459,681** | **40,277,943** |

10.2 It can be seen in Table 13 that the largest increase is within basic entitlement as this is where the funding for the former pay and pensions grants has been mainly distributed through.

10.3 **Table 14** shows the basic entitlement values for 2025/26

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | 2024/25  £ | 2025/26  £ | Difference  £ | Difference  % |
| Primary | 3,552.59 | 3,773.37 | 220.78 | 5.85 |
| Key Stage 3 | 4,975.15 | 5,315.52 | 340.37 | 6.40 |
| Key Stage 4 | 5,826.84 | 6,112.84 | 286.00 | 4.68 |

**Minimum Funding Guarantee**

10.4 The minimum funding guarantee has been set at -0.5% for 2025/26

10.5 **Table 15** shows the number of schools requiring protection from MFG in 2025/26

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2024/25 | 2025/26 | Difference |
| Primary | 36 | 250 | 214 |
| All-Through | 0 | 2 | 2 |
| Secondary | 2 | 52 | 50 |
| Total | **38** | **304** | **266** |

10.6 The number of schools requiring protection from MFG has increased from 38 schools to 304 schools. This can be expected when pupil numbers are declining and where the level of the minimum funding guarantee has reduced from 0.5% to -0.5%.

**Minimum per Pupil Level**

10.7 The minimum per pupil levels (MPPL) of **£4,995** for primary and **£6,465** for secondary have been fully implemented

10.8 **Table 16** shows the number of schools in 2025/26 that require additional funding through the minimum per pupil level.

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2024/25 | 2025/26 | Difference |
| Primary | 100 | 118 | 18 |
| All-Through | 0 | 1 | 1 |
| Secondary | 5 | 12 | 7 |
| Total | **105** | **131** | **26** |

10.9 The number of schools requiring protection from the minimum per pupil level increases from 105 schools to 131 schools.

**11. Central Expenditure**

11.1 **Table 17** shows the proposed central expenditure for the Early Years Block and the Central School Services Block for 2025/26.

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2024/25  £000 | 2025/26  £000 | Difference  £000 |
| Central Expenditure Under 5s | 3,696 | 3,680 | (16) |
| Former ESG Retained Duties | 3,080 | 3,280 | 200 |
| Admissions | 1,449 | 1,449 | 0 |
| Schools Forum | 37 | 38 | 1 |
| Statutory & Regulatory Duties | 2,026 | 5,558 | 3,532 |
| Prudential Borrowing | 3,804 | 0 | (3,804) |
| Licences for Schools | 1,362 | 1,577 | 215 |
| Total | **15,454** | **15,582** | **128** |

11.2 The increase in the former education services grant retained duties was agreed by Schools Forum at the meeting on 25th September 2024.

11.3 The increase in Statutory & Regulatory Duties reflects the increase in funding for retained duties **£352,000** and the historic commitments funding of **£3m**, which is held in a contingency until its use has been determined. The Authority is reviewing the original communications on reducing historic commitments to determine whether there is a risk the funding could be clawed back.

11.4 The funding for prudential borrowing ceased in 2024/25 which was the final year of the SEND & PRU capital programme.

11.5 Licences for schools reflects the increase in costs of the national licences purchased by the DfE for all schools.

**12. High Needs Block**

12.1 **Table 18** shows the proposed allocation of the High Needs Block for 2025/26.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | 2024/25 Budget  £000 | 2025/26 Budget  £000 | Difference  £000 | Difference  % |
| Place Funding:  - Special Schools  - Enhanced Provisions  - PRUs | 37,081  2,414  6,730  **46,225** | 37,160  3,170  6,730  **47,060** | 79  756  0  **835** | 0.2  31.3  0.0  **1.8** |
| Top-up Funding:  - Mainstream  - Special Schools  - PRUs  - Post 16 FE  - Independent Schools  - Enhanced Provisions  - Essex Pupils OLA Schools | 26,756  43,138  9,240  11,340  41,962  6,608  7,141  **146,184** | 38,967  49,234  9,240  12,144  52,742  4,046  9,187  **175,560** | 12,211  6,096  0  804  10,780  (2,562)  2,046  **29,376** | 45.6  14.1  0.0  7.1  25.7  (38.8)  28.7  **20.1** |
| SEN Support Services | 17,481 | 17,962 | 481 | 2.8 |
| Other Alternative Provision | 8,810 | 21,832 | 13,022 | 147.8 |
| Support for Inclusion | 9,224 | 10,730 | 1,506 | 16.3 |
| PFI Costs | 88 | 89 | 1 | 1.1 |
| Therapies & Other Health | 3,349 | 3,853 | 504 | 15.0 |
| Corporate Recharges | 4,935 | 5,558 | 623 | 12.6 |
| SEND Transport | 1,500 | 1,500 | 0 | - |
| Personal Budgets | 988 | 1,668 | 680 | 68.8 |
| HNB Contingency / (Deficit) | 604 | (24,841) | (25,445) | (4,212.7) |
| Total | **239,387** | **260,971** | **21,584** | **9.0** |

12.2 Table 18 shows that despite the **£21.8m** increase in funding there is a forecast in-year over spend of **£24.8m** for 2025/26.

12.3 Agenda item 7 shows the forecast outturn for 2024/25 which is an in-year over spend of **£24.8m** and a cumulative deficit of **£12.7m.** The forecast deficit at 31st March 2026 is **£24.1m** including the 1% transfer from the Schools Block and the approved **£1m** transfer from the Central School Services Block.

12.4 The causes of the forecast deficit have been previously discussed with Forum in the paper presented at the meeting on 25th September 2024.

12.5 **Table 19** shows the revised forecast for the High Needs Block.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 2024/25  £m | 2025/26  £m | 2026/27  £m | 2027/28  £m | 2028/29  £m |
| Expenditure | 263.1 | 285.8 | 320.0 | 352.2 | 395.2 |
| Income | (239.1) | (260.9) | (268.7) | (276.8) | (285.1) |
| (Surplus) / Deficit | 24.0 | 24.8 | 51.3 | 75.4 | 110.1 |
| SB Transfer | 0.0 | (12.5) | (5.9) | (5.9) | (6.0) |
| CSSB Transfer | 0.0 | (1.0) | 0.0 | 0.0 | 0.0 |
| Balance b/fwd | (11.3) | 12.7 | 24.1 | 69.5 | 139.0 |
| Balance c/fwd | **12.7** | **24.1** | **69.5** | **139.0** | **243.1** |

12.6 It is expected that the statutory override for DSG finishes on 31 March 2026, from which DSG deficits will no longer be separated from the Authority’s wider accounts. This will place immediate pressure on the Authority’s general fund of c. **£38m**. It should also be noted that reduced cash balances of £243m to fund the High Needs Block deficit by 2028/29 will have a direct impact on the Authority’s cash balances.

12.7 The costs the Authority incurs through servicing the deficit cannot be charged to DSG.

**13. Risks and Opportunities**

13.1 The budget is built on known assumptions and pressures identified so far. **Table 20** identifies pressures within the High Needs Block for 2025/26.



**14. Notification of School Budget Shares**

14.1 The Authority must inform maintained schools of their 2025/26 Schools Block allocation by 28th February 2025. New for 2025/26 is that both High Needs funding allocations and the funding rates for early years providers must also be notified by 28th February 2025. The ESFA will inform academies of their GAG allocations by 31st March 2025.

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 4** |
| Date: 15 January 2025 |  |

Any other business and feedback from associations and other Forum members

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 4a** |
| Date: 15 January 2025 |  |

**Finance Review Group**

**Draft Minutes of 10th December 2024**

**Microsoft Teams**

**09:00 – 10:09**

In Attendance

|  |  |  |
| --- | --- | --- |
| Jeff Fair (Chair) (JF) | Ruth Bird (RB) | John Hunter (JH) |
| Sue Bardetti (SB) | Nigel Hill (NH) | Harriet Phelps-Knights (HP-K) |
| Sean Moriarty (SM) | Pam Langmead (PL) | Carole Herman (CH) |
|  |  |  |
| **LA Officers** |  |  |
| Yannick Stupples-Whyley (YSW) |  |  |

|  |  |
| --- | --- |
| 1. | **Welcome and Apologies**  JF welcomed everyone to the meeting.  Apologies were received from Rod Lane and Clare Kershaw. |
| 2. | **Falling Rolls Fund**  JF requested that the paper be split into two discussions the first being the proposed changes to the criteria.  YSW explained the current criteria and proposed changes.  NH stated he did not have a problem with tightening up the criteria for larger schools. The thing that concerns him is the large allocations that go to larger schools that are eye watering. Can we put a cap on the amount a school receives for example £100,000 and can we limit the number of pupils capping it at one class of 30.  JF pointed out that the falling rolls fund is not just to protect small schools, it is to protect schools that will be required to use the places in the short future.  YSW confirmed the purpose of the falling rolls fund is to help schools remain viable whilst there is a temporary falling roll as the places will be required within two to three years.  JF asked for clarification on how funding is allocated. YSW responded it is the number of pupils to be funded multiplied by the basic entitlement. The number of places funded is the difference between PAN and the actual intake for the two consecutive years the roll is required to reduce.  SB asked if all the schools were in Trusts or maintained. YSW responded some are maintained but some are also in Trusts.  SB stated the issue we have with Trusts that pool balances. For maintained schools it is clear what the balance is but for some Trusts it is not clear.  YSW responded that the Trust with schools in the falling rolls fund provides a balance for all schools in the Trust.  NH stated that he can understand why we fund schools back up to their previous NOR but some schools where we are funding 46 pupils will never get there. Should we be tightening it to the next band of 30 pupils.  HP-K stated that for some schools they never had those pupils, they do not have them now and they will never have them. Should not they take steps to restructure. Are we paying schools that do not need the funding now.  YSW stated that through the balance criteria we are preventing schools using the falling rolls fund to build up a balance.  HP-K responded the point was supporting schools with additional staff they do not need.  JF stated that if that does not happen in year two schools will fall out of the falling rolls fund.  HP-K asked is it two years or yearly. YSW responded that once a school qualifies for the falling rolls fund it has one more year where the roll can decrease. After that, the roll must increase every year.  CH reflected on the circumstances that affected her former school that received falling rolls funding. It was the pressure caused by too many places in the area following the opening of a free school. The basic premise of is that the authority is predicting that the places will be needed in the short term and is less expensive to sustain the school for a short period. If you know that numbers are going to rise it is destabilising to have to get rid of staff knowing that you will need to recruit soon afterwards.  JH raised the issue of traveller schools and military schools where can disappear and then come back. Where Trusts declare balances for their schools, they also have a central reserve.  RB asked where the 8% in the balances criteria had come from. YSW explained it follows the DfE guidelines that secondary schools should have balances of no more than 5% of their revenue funding and for all other schools it is 8%.  JF stated there is still concern with the amount of money being allocated to some schools.  JF asked about pooled balances and how will it work with mixed Trusts. YSW responded the Authority will pro-rata balances to produce an average balance for primary and one for secondary.  JF summed up the conversion and asked firstly are members happy to accept the recommendations at 4.9 and 4.11 and secondly do we need to do some more work on the maximum funding schools should receive.  The recommendations at 4.9 and 4.11 were agreed and it was agreed for a review into the amount of funding that should be allocated.  YSW introduced the applications from Chigwell Primary and Hilltop Infant.  HP-K asked for Chigwell was what the difference in funding 9 pupils and taking into account the additional 15 pupils admitted into year 3. YSW responded it was about £101,000.  HP-K asked why would we consider this as everyone else is based on reception. YSW responded that the school had requested year 3 is also considered but as this is unusual the Authority is asking FRG for a steer.  JF sought clarification is the additional 15 pupils in the school’s admission criteria. YSW responded it was.  HP-K asked for Chigwell Primary what evidence have we seen of the balance or are we taking their professional word. YSW explained we just have an e-mail at this time but the Trust has to date published balances for each school. Academies have until 31st May to publish their accounts with Companies House so we are not sure when we will see it.  HP-K asked the same question for Hilltop Infant. YSW explained again it is just an e-mail from the Trust. The Trust has stated that for 2023/24 it will be pooling balances in their statutory accounts, so the only evidence available is from the Trust.  HP-K asked what the form entry of Hilltop Infant is. YSW responded PAN is 75 pupils.  HP-K asked about funding 46 pupils. YSW explained it is the difference between 75 and 49 and 75 and 55 being the PAN and intake for the two qualifying years for the school to be eligible for funding.  HP-K added we need to be mindful we could be giving money that is not needed. Is there more information we can get to find out what they are doing and what is the intention for the money.  JF stated the question for him is that KS1 class sizes should be 30, so 75 is an odd number.  JF added they will be working on two classes as they had 49 and 55. YSW confirmed it was 66 at October 2024.  SM asked for clarification on Chigwell Primary. If we ignore the additional 15 pupils would the school qualify for falling rolls funding. JF clarified it is calculated on total NOR.  JF was concerned that the increase in year 3 did not match the previous few years.  SM asked why the numbers did not show an increase of 15 in the year 3 column.  JF stated they have historically not received an intake of an additional 15 pupils into year 3.SM added it does not support funding 40 pupils.  NH moved back to Hilltop Infant and suggested funding is based on 2 classes as the 2 qualifying years are 2 form entry.  SM asked can we modify the criteria in some way so that funding never goes above a set level.  JF responded that is what we asking the authority to come up with some recommendations on how to allocate funding to schools. Paragraphs 4.9 and 4.11 deal what has been done in the past and the funding is what you are going to do in the future.  JF stated that if a school has a PAN that it predicts it will never reach, then the PAN is wrong and it needs to be set to what you can achieve.  JF refereed to the 10 Year plan for the planning group Hilltop Infant is located in. The area is predicting that NOR will fall over the next few years. Do Hilltop Infant qualify?  HP-K asked if they got 66 at October 2024, 55 and 49 in the previous years why are we funding 46. YSW responded the aim of the falling rolls fund is to fund the two qualifying years that make a school eligible through the school until the year groups exit the school.  JF stated the issue for infant schools is that you are funding the groups as they exit.  HP-K stated that the school does not look to meet the criteria.  YSW offered a final check which is to look at the School Capacity Plan to see if places are forecast to increase within the area.  JF stated that more information is needed for Hilltop Infant. We need a staffing plan like we used to review in the past.  JF moved members to recommend that Schools Forum approves the allocation for Chigwell Primary, which was approved.  SM referred to the £163,000 proposed allocation for Hilltop Infant and said that if a balance was £24,900 is 2.8% of their funding, this would be a significant proportion around 18%. YSW confirmed it was 19%.  JF stated justification of that level of funding is required and referred to when Shenfield High were required to submit staffing structures to justify the funding.  RB stated part of the recommendation should be to look at the PAN.  SB stated the numbers do not make sense. I went from 45 to 60 but when I did have 45, I mixed two year groups to make 3 classes of 30 pupils. An extra teacher for a small number of pupils does not make sense.  JF stated it reflects a fragmented education system where no one can do anything in some areas.  HP-K states the school’s website shows there are 8 teachers so I would imagine they have done what Sue says and mixed year groups.  JF stated we need to invite them to the next meeting to ask them about their structures.  CH stated that is where you will get the detail. We had a very detailed plan and that is why it got supported, but you need to hear from the school, to see exactly what they are doing.  JF stated the recommendation is that more information is required, we need to have justification of staffing levels.  YSW stated that the application will not be presented to Forum and the report will state the application was discussed and more information is required for the next meeting.  Members agreed the proposal.  JF asked if there was any other business. YSW stated the provisional settlement was out but there has not been enough time to model the impact before today’s meeting. |
| 3. | **Closing Comments**  JF wished everyone a happy Christmas. |

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| Schools Forum | **Agenda Item 5** |
| Date: 15 January 2025 |  |

**Schools Forum Meeting Minutes of 28th November 2024**

**held via Microsoft Teams**

**08:30 am – 10:49**

*(subject to forum approval)*

In Attendance

|  |  |  |
| --- | --- | --- |
| Ruth Bird – Chair | Charlotte Little (CL) | Jody Gee (JGe) |
| Jeff Fair (JF) | Steve Phillips (SP) | Stuart Roberts (SR) |
| James Saunders (JaS) | Nigel Hill (NH) | Liz Gelston (LG) |
| Don Wry (DW) | Marilyn Smith (MSm) | John Hunter (JH) |
| Claire Styles (CS) | Harriet Phelps-Knights (HP-K) | Natalie Christie (NC) |
| Jennifer Grotier (JG) | Robin Taverner (RT) | Lyn Wright (LW) |
| Rod Lane (RL) | Scott Bowak (SB) | Sue Bardetti (SBa) |
| Gary Smith (GS) | Debs Watson (DW) | Jinnie Nichols (JN) |
| Sean Moriarty (SM) | Jo Santinelli (JO) | Helen Taylor (HT) |
|  |  |  |
| **LA Officers** |  |  |
| Yannick Stupples-Whyley (YSW) | Andrew Page (AP) | Cllr Tony Ball (TB) |
| Ralph Holloway (RH) | Clare Kershaw (CK) | Val Cleare (VC) - Minutes |
| Carolyn Terry (CT) | Gareth Honeyford (GH) |  |
| **Observers:**  Kim Cannon (KC), Juniper Education | Pam Langmead (PL) | Carole Herman (CH) |

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| **1.** | **Apologies for Absence and substitute notices**  Apologies were received from Chanel Lassman, Michelle Steadman, Ruth Sturdy and Lydia Sherborne.  RB welcomed Kim Cannon as observer.  Steve Phillips substituted for Michelle Steadman, Helen Taylor for Chanel Lassman and Gary Smith for Ruth Sturdy.  It was noted today was the last meeting for Debs Watson and Liz Gelston. |
| **2.** | **Schools and High Needs Funding 2025/26 (Jeff Fair/Yannick Stupples-Whyley)**  The report presented to Schools Forum is the latest information on funding for 2025/26, the latest financial forecast for DSG and the recommendations of the Finance Review Group and High Needs Review Groups following the consultation with schools.  JF reported there is a slight change in the recommendations being made. We consulted on 1% going forward but due to DfE timescales, the initial disapplication had to be submitted in advance of this meeting. They have come back with some guidance and to look for a recommendation of both a 0.5% transfer and the Authority requested 1% transfer. It is not cumulative; it is not 1½%.  In the light of what we discussed at the Finance Review Group (FRG) and the High Needs Review Group (HNRG) we will be recommending that we support the half percent and the 1% transfer going forward. We did look at the money tree which has been shaken by the Chancellor at the budget and the extra money that is coming. But we do not know exactly how much Essex is going to get. When we looked at the report back in September of about £40m overspend, at the end of the financial year, and you will see elsewhere in the High Needs Block that they have been having an increasing deficit during the year. The deficit has been increasing by somewhere in the region of £1m a month at the moment.  We also consulted on the formula changes to meet requirements of the ESFA in terms of setting the Schools Budget for 2025/26. However, from the announcements made at the budget, it is still not entirely clear how much money schools themselves are going to be receiving because their additional grants mentioned the actual details of the two for the teachers’ pay and pension, and National Insurance changes which have not been disseminated in a way that enables anybody to do much effective planning. We reviewed the consultation at the sub groups and noted the response rate was extremely low, and discussed reasons why and the implications we might take from it. Whilst the general situation is bad for everybody, it is about trying to make sure it is manageable. As we have done in the past, we have tried to go the best way forward to ensure good education and support for schools and all pupils, and other education institutes going forward. We have also highlighted this report because alongside agenda item 3 to ensure the Local Authority is trying to manage the ongoing funding deficit.  JF finally commented that he lives in another Local Authority which is in a much darker place in terms of High Needs Funding which at the moment and historically has a significant deficit. JF commented on a meeting yesterday with the Cabinet Member for Essex, Cllr Whitbread. They were discussing the black holes of SEN funding because they have an impact not just in the long term but also on education themselves. It was noted Norfolk is suffering a little bit from that. Their Council is having to try to mitigate the deficit.  YSW reported since we last met, we had the budget on 30th October 2024 where it was announced a £2.3 billion increase in the core school’s budget to £63.9 billion. When the budget was announced for 2024/25, the actual increase was only £1.8 billion. The reason now it is £3.9 billion is to do with the teachers’ pay and pension grants moving to the schools block in 2025/26 so they need to be put into the 2024/25 baseline. The DfE has provided additional information that £1 billion of the £2.3 billion will increase High Needs funding to £11.9 billion. The remaining £1.3 billion part of that will go to Teachers pay award for 2024, so the core schools budget in this financial year is only for 7 months so the additional 5 months to make it a full year of funding is coming out of a £1.3 billion. There will be an increase in the mainstream schools National Funding Formula (NFF) and also an increase in pupil premium and other elements of core funding.  Then on 5th November 2024 the DfE provided a summary policy note for 2025/26. Local Authorities will still be required to move their local formula factors values to at least 10% closer to the NFF factor values, except where local funding formulae are already mirroring NFF. To be mirroring NFF the local formula value must be either 2½ percent above or 2½ percent below the NFFF factor value. Essex is mirroring NFF on all factors except the Key Stage 4 basic entitlement, and we will also be required to move the London weighting multiplier at least 10% closer to the NFF weighting. Minimum funding guarantee is going to be set either between minus 0.5% or 0%. The DfE is expected to publish the final NFF allocation by the end of November. Then the DSG allocation will be announced as usual in December which is normally the week before Christmas.  Table 3 showed the funding for the teachers’ pay pension and the core school budget grants being baselined into DSG. For example, the primary basic entitlement will increase by £213.00 for the three grants.  Table 4 showed the provisional NFF factor values for 2025/26. It is hoped these will be confirmed this week. This table shows the 2024/25 value. Former grants were shown in previous table. The next column shows the uplift for the additional five months for the core schools budget grant and then the uplift to the NFF values for 2025/26. Then finally the provisional values for 2025/26.  In terms of High Needs Block, it is a £1 billion increase to £11.9 billion. From this value the DfE will set aside £480 million to be allocated through a core schools budget grant in 2025/26 which will combine the teachers’ pay additional grant, the teachers’ pension employer contribution grant and the core schools budget grant into one grant. This will remain a separate grant. It will also hold back £145m for adjustments such as the impact of the October census, which means £11.3 billion will be allocated to the High Needs National Funding Formula which compares to £10.4 billion for the current year. So, it is a £900 million increase in terms of what is going through the NFF.  The historic spend factor will remain at the same cash value as 2024/25 which for Essex is £61.5 million. This will be equivalent for an average 25% of each Local Authority’s 2025/26 allocation, which is reducing from 27% in 2024/25.  Then in recognition of the continuing high level costs for Local Authorities, the funding floor will provide a minimum increase of 7% per head of the Local Authority 2 to 18 population and a maximum 10% increase per head of the 2-18 population. In comparison to the current financial year, it was a minimum 3% and a maximum of 5%. The minimum funding guarantee for special schools is 0% for 2025/26.  For the Central School Services Block, there is an increase from £394 million in 2024/25 to £338 million in 2025/26. For ongoing responsibilities, this will include the central employed teacher elements of the pension and school core budget grants, alongside funding that has just been paid for copyright licences in 2024/25, and that is rolled in for 2025/26.  Then to recognise additional exceptional copyright licences cost increases in 2025/26, there will be a further £4m nationally and this will be calculated as 7.1% of each Local Authority’s copyright licences for 2024/25. The floor will protect local authorities against excessive reductions allowing no authority to fall below the cap of -2.5%. Gains will be capped at 2.98%. Historic commitments will continue to reduce by 20%.  The provisional Early Years Block settlement is expected in early December.  Table 5 gives an update on the High Needs Block. As mentioned by Jeff, it is a worsening position and it is moving adversely on a monthly basis. It can be seen it has moved adversely by £4.5 million since we last updated Forum in September. The way it is now going, it is likely that whole of DSG will be in deficit by the end of 2024/25 financial year, which you will see it is at the moment £5.7 million surplus in Table 6. It has come down just over another £2 million in Period 7. It is now down to just over £3m surplus. So, we are expecting it to be in deficit.  YSW explained the movement in the Early Years Block. You will recall we reported in September that there was clawback for 2023/24 of £8 million. We had reported to you previously around an issue of 66 schools claiming pupils on both the Early Years census and the Schools census for 2022/23, and the DfE have now confirmed that they are clawing back £4.4 million. The final bullet point is Forum’s decision in September, to move £3m Early Years Inclusion Fund expenditure from the High Needs Block to the Early Years Block.  The next section concerns de-delegation for maintained secondary schools for 2025/26 for £1 per pupil as Sean was unable to attend the September meeting.  Section 7 is the DSG management plan. The condition of the Dedicated Schools Grant (DSG) is that any Local Authority with an overall deficit or has a DSG surplus, which is substantially reducing, which obviously ours is, we have to present a plan to the DfE for managing the future DSG expenditure. It covers about 20 to 25 tabs on a spreadsheet and these are broken down into three main sections. Some are narrative nature, detail, some are narrative information. Then there is a detailed breakdown of financial and people data by placement type. It is a working document which will be updated to reflect the latest financial forecast and as plans are developed to reduce expenditure. Schools forum will receive regular updates on the management plan. It is a big plan and we have not included the full plan at this time.  Figure 1 shows the financial summary from the DSG management plan, so as we have already told you it is a worsening financial position as we go through the years if nothing changes.  Figure 2 shows one of the main drivers, which is the increasing numbers of EHCPs which on this table is broken down by age group and it can be seen the number of plans is increasing year on year.  The management plan also shows the following initial plans to reduce expenditure and these were discussed with you in the September meeting 7.8 – 7.11 gives more information on each plan.  School funding consultation – JF has informed we had 8 responses which was a 1.5% response rate. A lot of questions considered the mechanisms the Local Authority might need to use in meeting the NFF requirements for 2025/26. The first question was asking about adjusting the minimum and maximum values to meet requirements. We had three schools agree, three schools against and one school not sure. We then asked if we needed to do that, which factors should we reduce? Mobility was the most popular followed by English as an additional language. Then low prior attainment, IDACI and the lump sum.  As stated earlier the Key Stage 4 basic entitlement is the one factor that we are not mirroring NFF at the moment. It is too high to mirror the National Funding Formula. Potentially this will need to be reduced each year in terms of coming towards the National Funding Formula. One of the mechanisms that we have to do is to adjust the Key Stage 3 and 4 basic entitlement which is above the National Funding Formula weighting. The response to this question was one secondary for and one secondary against.  The next question looked at lowering the value of minimum funding guarantee for 2025/26. Two schools were in favour, two were against, and two were unsure.  Question 5 concerned using capping gains to meet the requirements of NFF, for 2025/26. Three schools were in favour, two were against and two were unsure. We will be required to move the London weighting multiplier, but even though we are required, we still have to consult on it. Four schools were in favour, one was against it and two were unsure.  Then in terms of the question about 1% transfer, we had four schools in favour and four schools against.  Taking into account the responses to the consultation, the proposals for the Schools Block are to adjust additional needs factors towards minimum values allowed if required to meet the requirements of NFF. To adjust the lump sum towards the minimum value. To adjust, if required the Key Stage 3 and Key Stage 4 basic entitlement. To reduce the level of MFG if required and to use capping again if required and to increase the London weighting multiplier by the minimum amount required.  Once we get the provisional funding settlement, which is meant to be coming this week, we can then start to model a formula, and then decide what we might need to change. Hopefully, we would then be able to take some proposals to the Finance Review Group on 10th December 2024 ahead of them coming to January forum.  In terms of a response for transferring 1% from the Schools Block and the High Needs Block it was tied overall. Primary schools were 3-2 in favour. Secondary was 0-2 against, and special schools were 1-0 in favour. FRG and High Needs are recommending to Schools Forum that the transfer is approved subject to the decision of the Secretary of State. If we look in the minutes of agenda item 5A, you will see this was approved by 11 members and two members abstained.  **Questions/Comments**  RH asked James Saunders (JSa) to expand on what he said in the Chat.  JSa was checking whether the 5% needed secretary of state approval, which it has been stated it does not. JSa then asked s this a strategy to limit oversight and hold back the potential of the safety valve being enforced.  RH responded it is a strategy to reduce the deficit without directly impacting on our ability to meet the needs of children and young people with SEN. Other LAs are doing this by attempting to reduce the number of new EHCPs being issued and stopping movement into special schools. And that is why there will now be a National Audit Office investigation into the impact of the SV on children.  JSa said you then sent me a recent schools week article from a week ago which looked like other Local Authorities are breaking the law because they are not responding to EHCPs properly. It sounds like there is weak leadership in those Local Authorities. I would have thought intervention conditions should not be trumped, what is legally required. Then CK helpfully pointed out that those 66 schools, there has been a review of that, where it looked like, seemed like a lot of schools that have made a mistake on the census and that has been done.  RH was most concerned about the suggestion that it was about limiting oversight. RH felt it was more about ensuring that we have got oversight collectively in Essex rather than handing that over to someone else who will not from my experience of authorities that are in the safety valve and from meetings with the DfE, had a great deal. In fact, we will put on pressure to artificially reduce the number of plans being issued and in some Local Authorities imposing a very draconian system of limiting places.  At special schools, which will not work for RH, because it is not being done for schools, it is not being done for parents. I think the way we do things in Essex has been we do it collectively and collaboratively rather than just artificially saying, ok we have got a limit on the number of new plans being issued in the year or we are no longer admitting children at a certain level of need to our special schools. I do not think that is the way we do things here.  JSa was suggesting that if they were to do that, JSa would resist it and say No. That is not what I am suggesting when I say oversight there. Is it that we are taking a strategy to prevent the DfE coming in and doing some of that in the first place? JSa said as a strategy, ok I am not saying that we want to limit our oversight. I need to know if that happens, you will stand up and say, What is reported in that article just reeks of weak leadership in those Local Authorities. I need to know if we end up in a position like that, and they are telling us we have to limit that, well there has got to be a different way of doing it. It is just wrong, both legally and morally. I am not against what you are saying. I am just saying we cannot behave like other Local Authorities if it came to that.  CK clarified it is a complicated situation and she agreed that the Local Authorities that have gone down the safety valve route are probably regretting that very much because of the monitoring and scrutiny that they are under. Colleagues who are new to the forum may or may not remember we took some tough decisions around the High Needs Block. It was where we noticed a significant overspend on banding across our special schools, and we took a very tough decision at that point to go back to default bandings for special schools, which was one of the ways we were able to stop an overspend spiralling out of control.  CK explained the reason why we are having this discussion now is because the volume and complexity in the system needs funding. CK stated by entering into a deficit position on the High Needs Block for a couple of years is sort of manageable, but when the accumulation of the deficit year on year really moves forward and there is no mitigation to the accumulation of the deficit, which is when the deficit gets into the significant numbers that some Local Authorities, particularly Kent and Norfolk, are now facing. You will see many more Local Authorities issuing Section 114 notices, so we are doing things to avoid that. Obviously, agenda item 3 talks about the impact of the inclusion strategy now and how we are starting to see turning the tide in a very small way. All of this is to mitigate the size of the deficit.  **Recommendations:**   * Forum noted the funding information for 2025/26.   **Noted** that RL felt funding for the various blocks should be sacrosanct. If we take schools, they need every penny they have been allocated and therefore we should not be transferring money from the Schools Block to the High Needs Block. That has always been the view of the Forum over many, many years. However, I can understand that the High Needs Block supports what happens in mainstream schools and therefore I reluctantly agree to the various transfers.   * Forum noted the updated financial position of DSG for 2024/25. * For the secondary maintained member to agree the recommendation of FRG and HNRG to approve de-delegation for 2025/26 at 6.1.   It was noted that Sean Moriarty, not present today, had previously agreed this in the Finance Review Group (FRG).   * Forum agreed the recommendation of FRG and HNRG to approve the plans set out in the DSG Management Plan at 7.7 to 7.11. * Forum agreed the recommendation of FRG / HNRG that the Authority uses the funding mechanisms highlighted at 9.1 to meet the requirements of the NFF in 2025/26. * Forum agreed a 0.5% transfer from the Schools Block to the High Needs Block in 2025/26.   Forum agreed the recommendation of the FRG / HNRG that Schools Forum agrees a total 1% transfer from the Schools Block to the High Needs Block in 2025/26, subject to the final decision of the Secretary of State. |
| **3.** | **Inclusion Framework (Ralph Holloway)**  JF commented we continue with the good work started and appreciated the time taken to feed back as requested. JF noted the outcomes and possibilities that might arise in the future.  CK stated we are committed to an evaluation of early and prevention work that the Schools Forum is funding. The first of those is the inclusion framework and also funding the outreach offer being delivered through EPHA, ESSET, ASHE and the PRU’s and so much further ahead with the inclusion framework. We are sharing today the first schools that adopted the inclusion framework and better able to meet the needs of their children and the financial impact of the inclusion framework. It is now the inclusion strategy and within this we have added to the framework schools being able to access inclusion reviews. The trauma perceptive practice programme, and the wider workforce development.  We had a previous evaluation looking at the end of year one with a limited number of schools involved in that. We are using language of cost avoidancebecause the High Needs Block is in a deficit position so this is avoiding further costs. We want to focus more on the 2024 evaluation, and look at schools as well as qualitative and quantitative in terms of impact on schools, relating to absence, suspension rates and permanent exclusion rates. This is a massive priority for schools and the ongoing continued investment that schools are making regarding pupils who are persistently absent, but also permanent exclusions. The Local Authority has to then commission provision for those young people which is a cost to the Higher Needs Block and also better ability to meet young people’s SEND needs. All the schools that we evaluated have seen positive movement in those indicators.  Severe persistent absence dropped in all inclusion framework schools across 2020, 2021, 2022 and 2023 academic years. Where we actually had an increase for all other schools. More detailed case studies, three of which we included in this paper. We have Beauchamps, Kings Road and Saffron Walden County High. All three show early indications of cost avoidance, either one off cost avoidance or recurrent cost avoidance to the High Needs Block. The inclusion framework for Beauchamps had a one-off investment of **£130,000**. The school has implemented three curriculum pathways for children with an EHCP and/or children struggling to settle within a mainstream offer. This is not about restricting the number of children that come forward for any EHCP needs assessment, this is about the school being able better to meet needs. Any small reduction in workload is a bonus to the Local Authority.  Kings Road, there is a similar story. They are investing in training and provision for children with SCHM needs and ASD needs, particularly in the early years and reception phase of the school. We have avoided three permanent exclusions. We are just up to **£97,000** of costs avoidance. It is a similar situation with Saffron Walden County High School. There is no need for permanent exclusion. There has been a significant cost avoidance to the system. We now have over 140 schools accessing the inclusion framework. The panels to access the inclusion framework continue to meet monthly. The inclusion partners continue to work with schools who want to make an application. We have now got recurrent cost avoidance to the High Needs Block of £250,000 across three schools.  We are therefore proposing to make available this year **£2,000,000** of funding for that Schools Forum have agreed for early intervention, intervention and prevention. It is a reprofiling of the current budget to maintain the momentum in the investment and bring forward a further cost avoidance. These schools feel much more confident in meeting the needs of their children. It is significant in terms of the overall running of the school and to meet need.  **Questions**  HPK reported we have been successful in an inclusion bid and currently have 7 pupils who are Band 6, but our framework money has meant that we can keep them in the school rather than going to a special school. They are in a secure place, and they are still learning.  HPK stated a lot of schools are still facing significant delay in payments for pupils. It is a big impact on schools for IPA and EHCPs. Can this be followed up?  *RH responded this is on the agenda for CK’s Performance Board tomorrow. This is relating to information being added in a timely manner to Capita. We are aware and it is being addressed.*  HPK mentioned in the paperwork with the Comms this week about the High Needs funding operational guidance. There was something in that implied that schools were now having to pay the first **£10,000** instead of **£6,000**. Not sure if this has slipped under the radar, or whether it has been miscommunicated in that document?  *RH stated the National Funding Formula combines AWPU as it was plus the notional SEN funding. It is the NFF for the three elements of SEN funding.*  HPK – are we as schools now expected to pay the first **£10,000** rather than the first **£6,000**?  *RH indicated nothing has changed. Nothing has changed and we would assume AWPU allocated more widely. It is notional SEN funding we are looking at.*  *CK went back to HPK about her point about not being cost avoidance to you as a school, particularly if those children were now moving to a special school. There would be the place element of the cost of avoidance.*  *RH added to what HPK said, that Janet Duke has been excellent witness for the Local Authority at tribunal and helped us maintain a young person in mainstream school that would otherwise have gone into special or independent school at a much higher cost.*  **Recommendations:**  **The Forum agreed the recommendation of FRG / HNRG to the continuation of the Inclusion Framework approach as-is, and to receive a further impact report at the end of the academic year 2024-25.**  *DW wondered if inclusion framework is the best port here, or is that a separate funding stream to do something like that?*  *CK agreed this is separate. This is revenue. There are multiple strategies and the inclusion framework is one of them.*  **Forum noted that the funding allocated for 2025/26 is £2m which is within the £3.5m funding for early intervention notified to Schools Forum in September.** |
| **4.** | **Falling Rolls Fund 2024/25 (Yannick Stupples-Whyley)**  JF noted this has been to the RFG for consideration. There are some recommendations in 2.4 that we looked at ensuring current rules are still appropriate and ensure funding is only allocated as necessary. It will be seen in the report 5.3 discussing funding because two schools were asked for further information, and they will bring information for consideration to the January Forum meeting. At the time of writing, it is still anticipated Schools Block would have a surplus. I would recommend we have looked at this information presented to us quite carefully, to make these recommendations.  YSW had reported in July there were three academies with balances at the time that were not meeting the criteria, but they had given forecast balances. Forum decided not to allocate funding on forecast, and it was decided to bring these applications forward once we knew the actual balance at the end of 31st August 2024. Also, we had a couple of schools that notified back in January/February 2024 when the email went out about which schools met the initial criteria, who missed the original communication, and have come forward now. We had Mistley Norman supplied this balance which said 1st August 2024 and two additional plans from Dr Walker and Hilltop Infants, both which meet. Then Chigwell Primary have now submitted their closing balance but too late for F or D meeting. That will go forward to be read on 10th December 2024. As JF advised Hall Farm has requested a decision to remove the schools from the Falling Rolls Fund. Considered annexation shows the details for each application. The recommendation is that Schools Forum approves the applications for Mistley Norman and Dr Walker’s primary, and that the Hall Farm Infants is not added back to Falling Rolls Fund and that Schools Forum will consider the application for Hilltop Infants at their December meeting. Schools Forum approved a budget of **£836,000**. The 2024/25 at the moment requirement is **£739,000**. If Hilltop Infants satisfies the criteria it would come up to **£902,000**. There is about **£1.3 million** surplus available.  Annex B showed a breakdown of pupil numbers schools submitted from 10 year plan, funding to each of the schools on an annual basis. Whilst school is in Falling Rolls Fund it would have to meet the criteria but after year 3 it has to have an increasing roll each year.  **Questions**  HPK asked why does the Schools Block have a surplus balance?  *YSW stated the DfE provides additional funding from time to time which goes into the Schools Block surplus, and we hold that in terms of any issue, i.e., one year we may have a high requirement for the Growth Fund and we will draw it out rather than taking the money from schools.*  HPK enquired any thoughts to transfer that to the Schools Block?  *YSW responded it could be but then potentially problems we would have to ask schools.*  **Recommendations:**  **Forum agreed the recommendation of FRG that; Mistley Norman Primary and Dr Walkers Primary are funded through the falling rolls fund for 2024/25.**  **Forum agreed the recommendation of FRG that Holt Farm Infant are not added back to the falling rolls fund.**  **Forum agreed the recommendation of FRG that the applications from Hilltop Infant and Chigwell Primary are reviewed by FRG and brought to the January meeting.**  **Forum agreed the recommendation of FRG that a review of the criteria of the falling rolls fund is undertaken.**  **Forum approved the recommendation of FRG to approve the funding shown in Table 2 at 5.2.** |
| **5.** | **Early Years Update (Carolyn Terry)**  CT stated the purpose of the Early Years paper was to give an update on the forecast budget, take up of the new working parent entitlements, progress of the rollout of the Childcare Reforms Expansion, and spend to-date of the agreed funding projects and to endorse the proposal to implement a third year of funding to extend the four Early Years Early Intervention Partner roles until August 2026.  Section 4.2 set out funding take-up for the term. For the summer term we are reporting a really high take-up, 12% above the national average. With regards to the new working parent entitlements, 41% of families accessed a place. It feels we are broadly in line with national information. Take-up for 3-4 year olds is sitting strongly at 90%. The financial section around validation of new entitlement codes. Working parents have to get a code to be able to access a funded place. Validations are all in line with national or slightly above and doing well, 80% for all of them. We have only got the one term at the moment.  Section 5 – financial implications table sets up the forecast, the budget and what the forecast outturn was. We have got 15.9 movement in year. The bullet points break that down. The cause was by us being paid too much money by the DfE which we reported to them, and they have now told us how they are addressing that.  5.3 sets out the additional funding that has been allocated following the Teachers Pay Award and this will be distributed through of the Teachers Pay and Pension Grant for eligible schools and this will be added to this terms payments as well.  Section 6 – Childcare Reforms and progress we are making. The number of new places created is 1003 new wrap around places and 684 Early Years places. We do still have applications in progress of being evaluated or we have a monthly rolling programme for the revenue funding.  Tables showed breakdown by district and number of places created and the value of those. The first two tables are looking at capital funding, first one for Early Years and the second one is for the wrap around, and the third one is for the wrap around revenue funding. We continue to roll out the revenue funding. We have got a number of applications this month which we are evaluating.  The dates in 6.5.2 – monthly panels. We are also working through the survey responses at schools, and reaching out to schools to respond to queries and Essex for help.  6.5 sets out school inclusion funding pot. There was concern for school age inclusion funding and we did top slice the budget from childcare reforms for that. The paper says that **£28,000** has been awarded. We did actually have panel last week and that is figure is now up to **£53,000**, so that is on a terminally basis, and that will increase the allocation of funding to support schools and out of school providers.  Section 7 impact – update on Early Years needs.  Table 10 shows the update on the spend against the Early Years Block underspend projects that we put in place. The table gives an overview of what the proposal was and what the budget was that we have allocated to it. The right hand column shows the update for the impact. The first one is around the Early Years early intervention partner roles. We created four of these posts and these have had a big impact from having them in post. We have done an analysis between September 2022 and July 2023, and we can see a decrease in the number of applications funding and that also correlates with a decrease in the funding allocated in the same time period as well of just under **£200,000**.  We have got a different resource to offer our earlier settings. Where we have got applications coming in and where we think we are seeing children more with transient, delayed and emerging SEND needs, we have been able to go in and allocate a resource to work with those settings and provide some support whether it is around environment or making some adjustments. That means those children do not actually need funding to be able to access their childcare place. It is more practical help that can be put in place for them.  We agreed two years of funding when we brought this proposal forward with a possible third year funding, so the money was ring fenced. After the first year an overview of how the funding is going and the impact and evidence of making a difference then we would be looking to secure a third year of funding. We would actually like to be able to confirm that third year funding because that also means we are able to give assurance to the post holders.  The second part of the table shows we have increased our business management consultancy support per quadrant, previously we had two full-time equivalents across the county. So, part funding from the Schools Forum in the Early Years Block surplus and we have also been able to bring some childcare reforms funding for those providers wanting to expand and access funding to create more places. We have been able to give quick responsive advice on sustainability issues and to be able to support providers to make adjustments to their business models.  Next section is Essex Speech Club. Due to waiting lists for children to access speech and language therapists, we wanted to bring a resource in that is more about that lower level of needs to try and free up those children with more complex needs being able to get that access. There are a number of settings that have access to this funding and the number of children that are being reached, we have hit the targets we set, and more children are benefiting from this in Early Years settings. We have invested to date, **£78,750** which equates to an investment of **£187.00** per child. There was an initial target of 420 children, but we are now reaching far more than that.   * We are seeking a reduction in children being referred to speech and language therapists, particularly through early intervention. * We ring fenced funding for 2 years and would like more funding to keep that going. * Also been able to develop a sufficiency grant.   To date, 260,475 Early Year places have continued to be offered. We have invested in bringing in some support through an agency to help us to think about the next steps and how we can reach more families.  The final section, we have had feedback from our Early Years Sub Group and conversations remain a concern on funding levels, particularly the recent announcement in the budget has had a big impact for the sector about how much the rises, for example, around the minimum living wage and the changes to the national insurance threshold.  **Questions**  JF – looking at the tables in Section 6 on funding, is there any reason that Rochford has not applied for any funding or received any funding for anything?  CT – Early Years, a lot of Section 106 funding allocated in the area, but did not want to saturate the market, and we were already able to allocate funding to the sector in that district. We have tried to do with childcare reforms, money is put in areas where we have not got Section 106 funding. We have got 4 applications going through evaluation process, and hope for allocation of funding in the Rochford district.  **Recommendations:**  **The Forum noted the forecast outturn for 2024/25 at 5.1.**  **The Forum noted the spend to-date on the agreed funding projects set out in 7.1.**  **The Forum endorsed the proposal to extend the four Early Years Early Intervention Partner roles until August 2026.** |
| **6.** | **Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies.**  **ASHE**  CH was concerned about SEND and funding and was grateful to hear about cost avoidance within the system that CK had reported on. We have also got a lot of issues which CK is aware of, young people coming back into schools having been home educated which we are looking into with CK and collecting data to see how that can be managed.  New regulations around attendance we are still getting used to, and we are being well-supported by Anita Patel-Lingam from the Local Authority to make sure support is put in and we are able to code correctly under the new requirements and regulations. We are concerning ourselves with local issues, training and support that we offer to schools in our usual way with ASHE.  **EPHA**  HPK decided on 4 priorities for the year ahead, which are SEND, the curriculum, Headteacher wellbeing, recruitment and retention. Schools are keen to know what funding is available for 2025/26 so that they can start planning and determine staffing structures. There is concern that structures need to be reviewed so that budgets can be set.  SEND funding and the delay is still an issue and know it is being worked on. Schools are finding the increased workloads when trying to access further support for vulnerable pupils extremely challenging. Attendance is also a challenge for primary schools and the time it is taking in school to do everything that is required.  On a positive note, primary headteachers are very pleased with the ESSET and ECC’s Outreach Service that has been established. We are getting excellent feedback from the support and expertise. We are also getting excellent feedback from Heads and SENCOs who are benefiting from the support and expertise that is on offer.  **ESSET**  No report.  **PRU’s**  No report.  **Early Years**  Debs Watson formally gave a thank you to everyone and thanked RL, JF, YSW, CT, RH and for meeting with us for 4 years. From the maintained nursery point of view recruitment has been better this year and we are fully-staffed. In terms of budget, we are just waiting to see what allocations are, what happens with the Early Years budget and for the teachers’ pay pension. With regards to SEND, what happens with the funding and how that impacts on everybody moving forward and how easy that new system is to use. RB thanked DW for everything she had done.  **ESGA**  RL echoed everything which had been said so far. RB added we have sent out a survey to people who attended our café and chats, about 45 people had attended which is on a par with consultations in the county.  **Unions**  MSm said there is a hope that there is more clarity and an improvement in education funding at a national level. Concerns are around the direct impact on support staff.  JF stated the devil is in the detail about the funding that is coming forward. All the changes in national insurance and teachers pay are being made centrally. The backdated support staff pay rise is about to start. There is concern we are asking people to do more and more with less and less. Discussion had with Councillor Whitbread in supporting all schools and it is a huge pressure to maintain it. Schools are expected to do more duties to support children than in the past within the same budget envelope. All staff and management staff are stressed, and we are not sure that the new Ofsted is going to be much more supportive than the previous structure.  **Church Reps**  CL said there was nothing to report from the Church of England Diocese.  Jo Santinelli informed there was nothing to report from the Roman Catholic Diocese of Brentwood.  However, JS noted her four years term of office ended at today’s meeting, but Rob Simpson the Director of Education has confirmed he would be happy for JS to continue representing the diocese. If that is ok, JS will continue to be the diocesan representative.  **NB**: RB confirmed on behalf of Schools Forum that happy for JS to continue to be a member of Schools Forum.  **High Needs Review Group** – These were noted.  **Finance Review Group** – These were noted.  **Early Years Minutes** – These were noted.  **Any Other Business**  - None. |
| **7.** | **Minutes of 25th September 2024 (Chair)**  JS commented there was no mention of the detailed discussion along with colleagues. YSW informed from Page 57 onwards there are quite a few comments there. JS’s opinion it did not reflect the level of discussion. YSW responded that these minutes have been sent to the DfE and there were no issues raised. YSW stated for today there will be a full conversation and there will be a full transcript.  Further CK drew attention to JS comment at the bottom of Page 60 and over on to Page 61 it was felt the next two paragraphs attributed to what JS had said. May just need to add JS initials.  JS was asked to submit what he felt may be included with the minutes. 8 or 9 people commented on it.  It was noted that the last meeting was a face-to-face meeting.  **NB: The minutes were accepted as they are.** |
| **8.** | **Minutes Action Log (Yannick Stupples-Whyley)**  YSW reported:  18th May 2022 – Early Years – proposals for surplus plans – **In Progress**  18th May 2023 – Early Years – cost benefit analysis of  Underspend proposals - **Completed**  10th Jan 2024 – School Meals – on agenda for today’s discussion.  Annex A - **Completed** |
| **9.** | **School Meals Advisory Service Update (Gareth Honeyford)**  GH gave an update on the School Meals service. This was first brought for discussion a year ago and we presented the information that this traded service was operating at a loss and was projected to lose £200,000 if it continued in its current form. We had a discussion about whether or not the service was viable, whether to cease in its entirety.  Feedback from schools that the service was valued by those who used it. We have undergone a period of work consulted with EPHA, look at maintaining the service as it stood. Feedback from schools, still a desire to provide a service and to schools in modernised form. We consulted with EPHA again. We consulted with the unions and have been through a restructuring process and have come back with a digital first service that is now launched into schools, service level agreements have gone out and we are expecting the service to be full cost recovery over the next year or so.  **Question**  MS asked, has there been any feedback from the schools on their satisfaction or concerns with the new service you are offering?  Feedback is currently that the schools are happy with the service. Had good engagement. The move to digital seems to align well with the way that school food suppliers, for example, are moving to digital and already we have got a WhatsApp group which schools are utilising quickly, so feedback has been very positive.  **Recommendation:**  **The Forum noted the report.** |
| **10.** | **Constitution & Membership of Schools Forum (Yannick Stupples-Whyley)**  The current constitution was agreed in 2020 and effectively shows we have 28 members. Table 3 shows the ratio of pupils between primary schools and secondary schools which remains at 1.47. It does not need to change anything on the primary secretary representation. Table 4 shows pupils between maintained, academies between primary and secondary. So, the split to primary pupils between maintained schools and academies required for maintained members, and six academy members, which is currently the structure we have. In terms of secondary, whilst at least there is one maintained secondary school, we will always need one maintained member so that remains. The full list of membership at Annex A.  People coming to end of term:  Debs Watson  Lyn Wright  Ruth Sturdy  Liz Gelston  Jo Santinelli has agreed to continue.  In the next year, people coming to end of term (at September meeting):  Jinnie Nicholls  Claire Styles  Annex B breaks down the attendance for Schools Forum membership.  We are currently full although changes are coming with Liz Gelston leaving today.  Annex B shows attendance at Schools Forum;  Concern expressed that Chanel Lassman has not attended due to illness. Hopefully going forward, she will be able to attend.  High Needs Review Group – we have got good attendance.  Finance Review Group – good attendance  Early Years Sub Group – more fluid in terms that some people attend the odd meeting but we do have a core group that do attend most meetings.  **Recommendation:**  **The Forum noted that no changes are required to the Constitution of Schools Forum.** |
| **11.** | **Forward Plan (Yannick Stupples-Whyley)**  YSW read this out and confirmed the dates of future meetings.  In **2025** we next meet on 15th January. There will be a short agenda but very important DSG budget for 2025/26 to agree and possible DSG update.  **New Financial Year**  Add: JF – request put on to November 2025 – feedback from the School Meals Service – to see a year in operation.  CK reminded we have the inclusion framework coming back and an update where we will be in Outreach work. Bring back update on the early intervention and prevention work strategies that the school formally funded so that would include the Outreach Strategy as well.  **Recommendations**  **The Forum noted the dates of future meetings.**  **The additional items as proposed by Schools Forum were included in the Forward Plan.** |
| **12.** | **Chair’s Closing Comments (Ruth Bird)**  RB stated a big thank-you for this year’s, Forum for helping it to run so smoothly. Thank you to all those stepping down at this meeting and for their contributions over the years. We hope you will still support us.  RB wished everyone a very Happy Christmas and hope the run up to Christmas is smooth without too many complications. Wish you all a Happy New Year. |
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|  | **Next Meeting**  **Wednesday, 15th January 2025 at 8.30 a.m. – Microsoft Teams** |
|  | **Dates of Future Meetings**  **Wednesday, 21st May 2025 at 8.30 a.m. – IN PERSON**  **Wednesday, 9th July 2025 at 8.30 a.m. – Microsoft Teams**  **Wednesday, 24th September 2025 at 8.30 a.m. – IN PERSON**  **Wednesday, 26th November 2025 at 8.30 a.m. Microsoft Teams**  **Wednesday, 14th January 2026 at 8.30 a.m. – Microsoft Teams.** |

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| Schools Forum | **Agenda Item 6** |
| Date: 15 January 2025 |  |

**REPORT TITLE: Minute Action Log**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330 138464); e-mail: [yannick.stupples-whyley@essex.gov.uk](mailto:yannick.stupples-whyley@essex.gov.uk)

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| --- | --- | --- | --- | --- | --- |
| Date of Meeting | Report | Action Owner | Action | Response | Status |
| 18 May 2022 | Agenda Item 9 – Early Years Update | Carolyn Terry | To bring proposals for allocating the surplus balance to the July / September meeting. | See Agenda Item 3 section 9.13. Further recommendations will be brought in the Autumn Term after the final adjustment for 2024/25. | In progress |
| 10 July 2024 | Agenda Item 12 – School and Academy Balances | Yannick Stupples-Whyley | To review if interest on balances should be clawed back from schools | The Authority will review this when revised balances are presented to the May meeting. | In progress |

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| Schools Forum | **Agenda Item 7** |
| Date: 15 January 2025 |  |

**REPORT TITLE: SCHOOLS BUDGET & EDUCATION FUNCTIONS BUDGET UPDATE – Q3 2024/25**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330 138464); e-mail: yannick.stupples-whyley@essex.gov.uk

**1. Purpose of report**

1.1 To update Schools Forum on the forecast outturn position for the year-ended 31st March 2025 for both the Schools Budget and Education Functions.

**2. Recommendations**

2.1 That Forum notes the forecast outturn position for the year ended 31st March 2025.

###### 3. Relevant Schools Forum Power and Responsibility

3.1 **Table 1** shows the relevant responsibilities that Forum has in relation to the Schools Budget, which are taken from the Education and Skills Funding Agency’s **Schools forum powers and responsibilities** published in September 2018.

|  |  |  |
| --- | --- | --- |
| Local Authority | Schools Forum | DfE |
| De-delegation – proposes | Decides | Adjudicates where Forum disagrees with the Authority’s proposals |
| General Duties for maintained schools – proposes | Decides | Adjudicates where Forum disagrees with the Authority’s proposals |
| Growth Fund and Falling Rolls Fund – proposes | Decides | Adjudicates where Forum disagrees with the Authority’s proposals |
| Central Spend on Early Years and Central School Services – proposes | Decides | Adjudicates where Forum disagrees with the Authority’s proposals |
| Central Spend on High Needs – Decides | None, but good practice to consult. | None |

###### 4. Background

4.1 The forecast outturn for 2024/25 is set out at Annex A.

4.2 The total Dedicated Schools Grant (DSG) expected to be received for 2024/25 after academy recoupment is **£662.3m**.

4.3 The DSG forecast overspend for 2024/25 is **£37.5m**. **Table 2** shows the overall forecast DSG balance at 31st March 2025.



4.4 The significant variations contributing to the outturn position are:

**Schools Block - £491,000 overspend**

4.5 The forecast overspend is due to the funding agreed for the Growth Fund for 2024/25 which was above the allocation received. Schools Forum approved the additional funding was to be taken from the Schools Block surplus balance. This will occur at year-end when the funding will be drawn down to offset the overspend.

**Central School Services Block - £42,000 overspend**

4.6 The cost of the national licences purchased by the DfE have significantly increased in 2024/25 resulting in an over spend of **£166,000**. The DfE has provided additional funding of **£113,000**, which does not fully fund the increase in cost.

**High Needs Block - £24m overspend**

4.7 Top-up funding for maintained schools, academies and Post 16 FE is forecasting a **£19.7m overspend** due to an increase in demand and the increase in the average cost of banding, as more pupils are awarded higher bands.

4.8 Top-up funding for Independent Providers is forecasting a **£2.7m overspend** due to increases in demand and cost.

4.9 SEN Support Services is forecasting a **£2.6m underspend** which is due to the HNB contingency where funding exceeded the budget set **£2m**, a second year where the pension deficit payment has been deferred **£784,000** and the agreement of Schools Forum to transfer expenditure on the Early Years Inclusion Fund to the Early Years Block **£3m**. This is partially offset by increased staffing costs in the specialist teaching teams **£315,000**, an increase in demand for individual pupil resourcing agreements (IPRA) **£763,000** and the reinstatement of the recharge for non-statutory duties of Education Psychologists **£2m**.

4.10 Other Alternative Provision is forecasting a **£4.2m overspend** due to a forecast increase in pupils receiving individual pupil educational support.

4.11 Support for Inclusion is forecasting a **£275,000 underspend** due to vacant posts in the quadrant Inclusion Partner teams.

4.12 Direct Payments is forecasting a **£245,000** **overspend** due to increased demand for personal budgets.

4.13 There is a very high risk that the High Needs Block overspend will increase over the remaining months of the financial year.

**Early Years Block** – **£13m overspend**

4.14 In July the DfE announced the final allocation for 2023/24 which resulted in a clawback of **£8.5m** as the number of children taking up the free entitlement was lower than the DfE forecast.

4.15 In November the DfE confirmed the clawback of **£4.4m** where 66 schools had claimed pupils on both the Early Years Census and the Schools Census.

**Education Functions**

4.16 **Table 3** shows the funding Schools Forum agreed at the meeting of 27th September 2023 for the statutory duties the Authority holds for all schools for 2024/25.

|  |  |
| --- | --- |
| Education Functions – All Schools | £’000 |
| Education Welfare | 1,566 |
| Strategic Management | 1,155 |
| Asset Management | 359 |
|  | **3,080** |

4.17 **Table 4** shows the funding maintained school members agreed at the meeting of 27th September 2023, to de-delegate £48.59 per pupil to fund the statutory duties the Authority holds for maintained schools for 2024/25.

|  |  |
| --- | --- |
| Education Functions – Maintained Schools | £000 |
| Asset Management | 252 |
| Statutory & Regulatory Duties | 2,043 |
| School Improvement | 415 |
|  | **2,710** |

4.18 The funding shown in Table 4 is subject to academy recoupment when maintained schools covert to academies. **Table 5** shows the impact for the 6 schools that have converted in 2024/25.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Asset Management  £ | Statutory & Regulatory Duties  £ | School Improvement  £ |
| Original Budget | 252,478 | 2,042,676 | 415,044 |
| Recoupment | (199) | (1,614) | (328) |
| Revised Budget | 252,279 | 2,041,062 | 414,716 |

4.19 **Table 6** shows the forecast outturn position for Education Functions 2024/25 which is a **£8,000** overspend.

|  |  |  |  |
| --- | --- | --- | --- |
| Education Functions | Budget  £000 | Forecast  Outturn  £000 | Variance  £000 |
| Education Welfare | 1,566 | 1,549 | (17) |
| Strategic Management | 1,155 | 1,213 | 58 |
| Asset Management – all schools | 359 | 359 | 0 |
| Asset Management – maintained schools | 268 | 268 | 0 |
| Statutory & Regulatory Duties | 2,168 | 2,135 | (33) |
| School Improvement | 438 | 438 | 0 |
| Total | **5,954** | **5,962** | **8** |

4.20 The overspend is due to additional business support costs offset by staffing vacancies.

**5. Other Resource Implications**

**6. Consultation with stakeholders**

**7. Background / Supporting papers.**

**Annex A**



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| Schools Forum | **Agenda Item 8** |
| Date: 15 January 2025 |  |

**REPORT TITLE: Forward Plan**

Report by Yannick Stupples-Whyley

Contact details: Telephone (03330 138464); e-mail: [yannick.stupples-whyley@essex.gov.uk](mailto:yannick.stupples-whyley@essex.gov.uk)

**1. Purpose of report**

1.1 To bring the Schools Forum Forward Plan and confirm the dates of future meetings.

**2. Recommendations**

2.1That the Forum notes the dates of future meetings.

2.2 That additional items as proposed by Schools Forum are included in the Forward Plan

###### 3. Background

3.1Following a review of School Forum Agendas a Forward Plan has been created. The items included are as follows:

|  |
| --- |
| **Regular and Administrative items** |
| Apologies |
| Any other business and feedback from schools through Associations |
| Feedback from Schools Forum representatives on other bodies |
| Minutes from previous meetings |
| Forward Plan and dates of next meetings |
| Sub Group updates (HNRG, Early Years, FRG) |

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| --- | --- |
| **Date of Schools Forum** | **Agenda Items** |
| Wednesday 21st May 2025 | Falling Rolls Fund (D) |
| (In-Person tbc) | Schools Budget & Education Functions Draft Outturn Report 2024/25 (I) |
|  | Constitution and Membership of Schools Forum (D /I) |
|  | School and Academy Balances (I) |
|  | High Needs Block / DSG Management Plan (D/I) |
|  | Early Years and Childcare Update (I) |
|  | Impact of SEND Early Intervention Strategies (I) |
|  |  |
| Wednesday 9th July 2025 | Schools Budget and Education Functions Q1 Update 2025/26, including High Needs Block Update (I) |
| (Microsoft Teams) – proposed cancellation | DSG Management Plan (D/I) |
|  |  |
| Wednesday 24th September 2025 | Half Year Budget & Education Functions Update 2025/26 (I) |
| (In Person tbc) | Falling Rolls Fund (D/I) |
|  | Scheme for Financing Schools (D) |
|  | High Needs Funding 2026/27 (D/I) |
|  | School Funding 2026/27 including school funding consultation (D) |
|  | DSG Management Plan (D/I) |
|  | Impact of Early Intervention Strategies (I) |
|  | De-Delegation 2026/27 (D) |
|  |  |
| Wednesday 26th November 2025 | Early Years and Childcare Update (I) |
| (Microsoft Teams) | School and High Needs Funding 2026/27 (D) |
|  | Inclusion Framework (I) |
|  | Constitution and Membership of Schools Forum (D / I) |
|  | Falling Rolls Fund (D) |
|  | DSG Management Plan (D/I) |
|  | Scheme for Financing Schools (D) |
|  | Schools Budget & Education Functions Update (I) |
|  | Feedback from School Meals Advisory Service (I) |
|  |  |
| Wednesday 14th January 2026 | DSG Budget 2026/27 (D) |
| (Microsoft Teams) | Third Quarter Budget Update 2025/26 (I) |
|  | DSG Management Plan (D/I) |
|  | Impact OF Early Intervention Strategies (D/I) |
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| Schools Forum | **Agenda Item 9** |
| Date: 15 January 2025 |  |

**Closing Comments**

Date of Next Meeting – 21st May 2025 (In Person - tbc)

1. FRAS – Families Receiving Additional Support [↑](#footnote-ref-2)