**Schools Forum Agenda**

Wednesday 21st May 2025, **Hamptons Sports & Leisure, Chelmsford, CM2 9FH**

Arrival from 8am for an **8.30am start**; breakfast **10am**, finish by **11am**.

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

**Decision Papers**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 2 | Early Years and Childcare Update | Carolyn Terry | All schools | 2 |
| 3 | Falling Rolls Fund 2025/26 | Yannick Stupples-Whyley | All schools | 9 |
| 4 | School and Academy Balances | Yannick Stupples-Whyley | All schools | 16 |

**Forum Business**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 5 | Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies | Chair | All schools | 22 |
| 6 | Minutes of 15th January 2025 | Chair | All schools | 34 |
| 7 | Minutes Action Log | Yannick Stupples-Whyley | All schools | 54 |

**Information Papers for Discussion**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 8 | Schools Budget & Education Functions Draft Outturn 2024/25 | Yannick Stupples-Whyley | All schools | 55 |
| 9 | School Funding Update 2025/26 | Yannick Stupples-Whyley | All schools | 60 |
| 10 | Constitution and Membership of Schools Forum | Yannick Stupples-Whyley | All schools | 63 |
| 11 | Forward Plan | Yannick Stupples-Whyley | All schools | 72 |

**Election of Chair / Vice-Chair**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 12 | Election of Chair / Vice-Chair | Yannick Stupples-Whyley | All schools | 74 |

**Closing Comments**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 13 | Closing Comments | Chair |  |  |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 2** |
| Date: 21 May 2025 |  |

**REPORT TITLE: EARLY YEARS FUNDING 2025-26**

Report by Carolyn Terry

Contact details: Telephone (03330 136481); e-mail: Carolyn.terry@essex.gov.uk

**1. Purpose of report**

* 1. To update Forum on the forecast budget requirement for 2025/26 of the two, three & four year old Free Early Education Entitlement (FEEE).
	2. To update Forum on the ongoing take up of the new working parent entitlements for eligible parents of children aged from 9 months old.
	3. To update Forum on the progress of the roll out of the Childcare Reforms Expansion.
	4. To update Forum on proposals to distribute a proportion of the Early Years Block surplus.
1. **Recommendations**
	1. That Forum notes the provisional outturn for 2024/25 at 5.1.
	2. That Forum endorses the proposals to distribute a proportion of the Early Years Block surplus at 5.4.2.
2. **Relevant Schools Forum Power and Responsibility**
	1. Table 1 shows the relevant responsibilities in relation to Early Years which is taken from the Education and Skills Funding Agency’s Schools forum powers and responsibilities published in September 2018.

|  |  |  |
| --- | --- | --- |
| Local Authority | Schools Forum | DfE |
| Early Years Funding Formula – Proposes and Decides | Must be consulted | Checks compliance with regulations. |
| Retained Expenditure - Proposes | Decides | Adjudicates where Schools Forum does not agree local authority proposal. |

1. Background
	1. FEEE funding supports the statutory universal offer to all three- and four-year-olds, up to 40% of the least advantaged two-year-olds; these are children who meet predetermined eligibility criteria and access to a funded place for eligible working parents for children from the term after they turn 9 months old.
	2. At the end of the Spring 2025 term: -
* The take up of the universal three- and four-year-old FEEE at the Spring term 2025 headcount was 32,101, which is 93.4% of the eligible three- and four-year-olds.  This is marginally lower than the national take up of 93.7%.
* Across Essex, currently 20% of all two-year-olds are eligible to access the funding. The take-up of the disadvantaged two-year-old FEEE during the Spring 2025 term was 2,343, which was 68.9% of the 3,370 eligible two-year-olds in the county. This term the take-up figure is lower than the national take up level for the Spring 2025 term of 73.9%. This drop has been investigated and is due to 66 children accessing a funded place via the working parents’ entitlement, if these children are added to the disadvantaged funding this increases the take up to 81.3%. We are currently looking in how these children can be allocated against the correct funding source going forward, but in the meantime we will report take-up including any eligible children that have accessed the working parents’ entitlement.
* The take up of the new working parents two-year-old FEEE during the Summer term was 7,717. This is a 45.93% take-up, which is in line with the take up figure for last term, and it is expected that this % will continue to increase over the coming terms. At this point we do not have access to any comparable national or east region data for comparison purposes.
* The take up of the new working parents with children aged 9 months and over two-year-old FEEE during the Spring 2025 term was 6,531. This is a 35.25% take-up, which is slightly higher than the take up figure for last term It is expected that this % will increase over the coming terms, and at this point we do not have access to any comparable national or east region data for comparison purposes.
	1. The following table shows the breakdown of working parent eligibility codes have been issued for the new working parent entitlements for the Spring 2025 term.



1. **Financial Implications**
	1. Table 2 shows the provisional outturn for 2024/25.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Budget£’000 | Forecast Outturn£’000 | Variance£’000 |
| Under 2s | 20,073 | 25,003 | 4,930 |
| 2 Year Olds Deprived Backgrounds | 12,579 | 11,684 | (895) |
| 2 Year Olds Working Families | 33,232 | 31,282 | (1,950) |
| 3 and 4 Year Olds | 94,996 | 90,836 | (4,160) |
| Inclusion Fund | 2,168 | 2,407 | 239 |
| Early Years SENCOs | 1,300 | 1,300 | 0 |
| EY Quadrant Teams | 789 | 791 | 2 |
| Quality & Improvement | 836 | 833 | (3) |
| Contingency | 0 | 13,078 | 13,078 |
| Education Service Recharge | 151 | 151 | 0 |
| Corporate Overheads | 498 | 498 | 0 |
| Total | **166,623** | **177,864** | **11,241** |

* 1. The overall take-up of free entitlement places is less than the funding received from the DfE, resulting in a **£2m underspend**. It is expected that the DfE will clawback the **£2m** when the final adjustment for 2024/25 is calculated in July 2025. The **£13m overspend** on the contingency budget represents the clawbacks for 2022/23 and 2023/24 which have been previously discussed with Forum.
	2. Table 3 shows the impact of the provisional outturn on the overall Early Years Block surplus balance.

|  |  |
| --- | --- |
|  | £m |
| Opening balance 1st April 2024 | (21.2) |
| Provisional Outturn 2024/25 | 11.2 |
| Balance at 31st March 2025 | **(9.9)** |
| Expected clawback July 2025 | 2.0 |
| Forecast Balance 31st March 2026 | **(7.9)** |

* 1. It is proposed to distribute a proportion of the current Early Years Block surplus through the following mechanisms, subject to the outcome of the Census data confirming whether the DfE will be seeking to clawback **£2m** of this in July 2025.
		1. One element of the proposal is to distribute **£3m** of the surplus, and for this figure to be divided by the 21,225,362 hours that were funded in the 2024/25 financial year. This would equate to an additional payment of **£0.14** for every funded hour paid to each childcare provider and would be equal to **£79.80** for each full-time funded place.
		2. The second element is to extend the current Early Years Early Intervention Partner roles for a further 3 years, once the current contracts expire in August 2026, at a total cost of **£838,000**.

|  |  |  |
| --- | --- | --- |
| Financial Year | Total cost per post | Total cost for 4 posts |
| 2026/2027 | £67,767 | £271,068 |
| 2027/2028 | £69,800 | £279,200 |
| 2028/2029 | £71,894 | £287,576 |
| Total |  | **£837,844\*** |

\*Redundancy costs for these 4 posts will also need to be calculated and ringfenced

* + 1. Further plans to distribute any remaining surplus will be brought to Forum, once the DfE clawback figure in confirmed in July 2025.
		2. It is requested that Forum endorses this approach in principle, to distribute **£3m** to the early years sector and to ringfence **£838,000** to extend the current EYEIP roles for a further 3 years up to March 2029, subject to there being sufficient funding after the DfE adjustment in July 2025.
1. **Update on the roll out of the Childcare Reforms Expansion programme**
	1. Since the start of the roll out of the Childcare Reforms Expansion programme funding has been agreed, or in the process of being agreed to create: -
* 1,604 new wraparound childcare places
* 516 new under 3 early years places
	1. The tables below set out the number and value of applications received, along with the district these relate to.

**Capital funding allocations**

* 1. Capital Funding for Under 3’s places

|  |  |  |
| --- | --- | --- |
| District | Places Created | Funding(Spent / Committed)£ |
| Basildon | 7 | 19,460 |
| Braintree | Tbc | 50,000 |
| Brentwood | 16 | 46,500 |
| Castle Point | 85 | 294,000 |
| Chelmsford | 22 | 20,500 |
| Colchester | 51 | 152,420 |
| Epping Forest | 151 | 299,000 |
| Harlow | 40 | 122,500 |
| Maldon | 18 | 48,558 |
| Rochford | 20 | 300,000 |
| Tendring | 40 | 131,550 |
| Uttlesford | 66 | 198,950 |
| Total | **516** | **1,638,438** |

* 1. Capital funding for Wraparound Places

|  |  |  |
| --- | --- | --- |
| District | Places Created | Funding(Spent / Committed)£ |
| Basildon | 40 | 57,000 |
| Braintree | 118 | 198,348 |
| Brentwood | 72 | 153,232 |
| Castle Point | 0 | 0 |
| Chelmsford | 25 | 125,469 |
| Colchester | 60 | 99,890 |
| Epping Forest | 0 | 0 |
| Harlow | 60 | 23,443 |
| Maldon | 20 | 20,000 |
| Rochford | 20 | 140,532 |
| Tendring | 26 | 10,715 |
| Uttlesford | 0 | 0 |
| Total | **441** | **828,629** |

6.5 The budget remaining is **£345,000**.

**Wraparound Revenue Funding**

|  |  |  |  |
| --- | --- | --- | --- |
| District | Places Created | Funding Awarded£ | Maximum Funding Allocated£ |
| Basildon | 196 | 40,000 | 150,000 |
| Braintree | 253 | 173,499 | 300,000 |
| Brentwood | 30 | 30,000 | 30,000 |
| Castle Point | 40 | 30,000 | 30,000 |
| Chelmsford | 149 | 20,202 | 90,000 |
| Colchester | 240 | 74,885 | 330,000 |
| Epping Forest | 54 | 19,773 | 120,000 |
| Harlow | 106 | 42,641 | 99,663 |
| Maldon | 65 | 10,000 | 60,000 |
| Rochford | 70 | 20,000 | 90,000 |
| Tendring | 135 | 51,100 | 212,500 |
| Uttlesford | 90 | 29,000 | 150,000 |
| Total | **1,428** | **541,100** | **1,662,163** |

* 1. Throughout this process, the DfE are requiring local authorities to submit regular updates and progress reports on the allocation of funding and creation of new places.
	2. Next steps
		1. Based on the value of the Capital funding applications received, it is not anticipated that there will be enough funding left for a 3rd round of funding applications. Should any of the schemes not go ahead, this will be revisited.
		2. Wraparound Revenue - the rolling monthly application process will continue with applications due in for deadlines The recent school survey responses are being analysed and work underway to match schools with third party providers or offering 1:1 support where this has been requested.
		3. As previously reported, funding has been ringfenced from the grant received from the DfE to ensure there is financial support for schools and settings for any enhanced staffing levels that may be needed to support children with SEND to access a wraparound place. To date £28,000 has been awarded.
	3. **Schools Based Nurseries**
* 48 school expressed an interest in the DfE funding.
* 22 schools were able to submit an application to DfE (many of those were not able to submit an application for this round have registered their interest with the DfE for future funding)
* 13 Essex schools were successful.
* 10 academies and 3 maintained school
* Potentially 302 new early years and childcare places to be created.
* Phase one

We will continue to work with the successful schools and support them to be open within the time scales outlined in their application.

* Phase Two

The allocation of funds for 300 schools in the initial phase, was part of the Government's commitment to establishing 3,000 new school-based nurseries within the current term of office.

While no details have been announced as yet, in anticipation of future funding we will be working internally with schools and SEND colleagues to prepare a strategic overview of school space and potential opportunities for expansion.

* 1. **Pilot Breakfast Clubs**
* 15 early adopters from Essex began offering free breakfast in school from the beginning of April. The government's aim is that pupils start every day ready to learn, and in turn will improve behaviour, attendance and attainment.
* Breakfast clubs are a minimum of 30 minutes and offer a healthy, nutritious meals that meet School Food Standards.
* Essex County Council have emailed all 15 early adopters with an offer of support.
* SEP’s will be sending out an email to the 15 schools from part of the Health Determinants Research Collaboration (HDRC). They are also offering to support schools with the evaluation of breakfast clubs. They will be starting with a webinar on June 11th at 4pm.
* Initial funding of around £1,500 will be paid for Academy schools directly by DfE and maintained schools from Essex County Council.
* DfE will pay the 60p per child per day element of funding based on the school census return over a specified one-week period each term. For early adopters please note your first return is based on the week commencing 9th June.
* No dates have yet been given for a full national rollout.
1. **Schools Forum Early Years and Childcare Reference Group**

The Schools Forum Early Years and Childcare Reference Group has continued to meet during 2025, with ongoing representation from all early years’ sector types and each district.

The key areas of discussion have continued to be around the increasing level of need of children and recruitment and retention of qualified staff.

The Budget announcements around increasing both the minimum wage and changes to the National Insurance Contributions (NICs) are adding significant financial impacts on early years settings. Additionally, on 21 February 2025

the DfE issued updated statutory guidance on how the funded entitlements should be implemented. Whilst there was not any material change in the guidance, the DfE have said these changes aim to enhance clarity and ensure that the funded childcare entitlements are fully accessible to all eligible families. The lateness of this revised guidance being issued has put additional pressures on the early years sector, as some childcare providers need to make adjustments to how they offer the funded entitlements.

This will be further compounded by the additional increase to the number of funded hours working parents of children aged from 9 months to 2 increasing from 15 hours per week to up to 30. In practice this means that for the majority of providers at least 80% of their income will be via the funded entitlements.

Future meetings have been scheduled to coincide with reporting to Schools Forum.

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 3** |
| Date 21 May 2025 |  |

**REPORT TITLE: FALLING ROLLS FUND 2025/26**

Report by Yannick Stupples-Whyley

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

**1. Purpose of report**

1.1 To present to Schools Forum the schools recommended by the Finance Review Group (FRG) to be funded through the Falling Rolls Fund for 2025/26 and the proposed change to the methodology for funding schools from 2026/27.

**2. Recommendations**

2.1 To note that since academy trusts have been pooling balances, the principle for determining an individual school’s balance at 4.3.

2.2 To agree the recommendation of FRG to allocate funding to schools from April 2026 for any vacant places between 80% of the published admission number and the actual number on roll for a maximum of 3 years at 4.13.

2.3 To agree the recommendation of FRG that Clavering Primary, Wethersfield Primary, Dr Walker’s Primary and St John the Baptist Primary receive falling rolls funding in 2025/26 at 4.16 and 4.19.

2.4 To note that Finchingfield Primary, Chigwell Primary, Stourview Primary and St Mary’s Primary Ardleigh are assessed for meeting the balance criteria on their actual balances at 31st August 2025 at 4.16 and 4.20.

2.5 To agree the recommendation of FRG that Prettygate Infant and Tollesbury Primary are removed from the falling rolls fund as both schools do not meet the balance criteria at 4.17 and 4.21.

2.6 To note that the applications for Stambridge Primary and Waterman Primary will be brought to the meeting on 26 November 2025 at 4.22.

2.7 To agree the recommendation of FRG that Hilltop Infant is not eligible to receive funding as the balance criteria is not met at 4.29.

###### 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 approved the falling roll and balance criteria at the meeting of 15 January 2025.

4.2 The DfE has set a mandatory criteria that the latest School Capacity Plan must show that the places are expected to be required in 2025/26 or the subsequent 2 years.

4.3 Academy Trusts with Essex Schools first started pooling balances in the 2014/15 academic year and at this point the Authority adopted the principle of allocating the pooled balance between each relevant phase using pupil numbers to pro-rata the balance. This principle is shown in Agenda Item 4 at 4.2. To maintain consistency this principle has been used for the falling rolls fund since the first academy from a Trust that pooled balances met the criteria. The balance used is taken from the accounts recorded on the Companies House website which again is consistent with Agenda Item 4.

4.4 It was agreed at the meeting of 15 January 2025 that the Finance Review Group undertake a review of how funding is allocated to schools. Currently schools receive the relevant basic entitlement multiplied by the agreed number of pupils to fund.

4.5 Methodologies for distributing funding allowed by the DfE include:

* A rate per vacant place, up to a specified maximum number of places; or
* A lump sum payment with clear parameters for calculation (for example the estimated cost of providing an appropriate curriculum, or estimated salary costs for the number of staff who would otherwise be made redundant).

4.6 Essex’s current methodology is as follows:

* For the first year -the difference between the reception (published admission number (PAN) and actual number on roll (NOR) in reception for the two years that qualify the school for the falling rolls fund is funded. The number of pupils to fund is multiplied by the primary basic entitlement value.
* The following year in addition to the pupils funded for year 1, the difference between reception PAN and actual NOR is also funded to reflect that the total NOR is allowed to fall in year 2. At this point the total pupils funded is set for future years.

4.7 **Table 2** shows an example of how this works

|  |  |  |  |
| --- | --- | --- | --- |
| Census | Reception PAN | Reception NOR | Pupils to Fund |
| October 2021 | 30 | 17 | 13 |
| October 2022 | 30 | 16 | 14 |
| Year 1 Total |  |  | **27** |
| October 2023 | 30 | 25 | 5 |
| Year 2 Total |  |  | **32** |

4.8 In 2024/25, 22 authorities operated a falling rolls fund. The majority of local authorities use the basic entitlement as the unit value of funding however the majority do not fund the full difference between PAN and NOR and opt to use a threshold. For example, some authorities use a threshold of 85% of PAN, which in the above example would fund the difference between 25.5 pupils and the actual NOR in reception. This would fund 18.5 vacant places instead of 32. One authority funds schools using the cost of a teacher to determine funding, funding 1/30th of the salary of a main scale 5 teacher for each vacant place.

4.9 Essex currently funds the falling rolls fund up to a maximum number of years equivalent to the number of year groups each school has subject to the school continuing to meet the falling rolls criteria. This is based on the original falling rolls fund where the two secondary schools received funding for 5 years. However, some authorities restrict funding to 3 years which reflects that the NOR should be increasing and therefore funding will increase.

4.10 The following options were discussed by FRG:

* Option 1 – No change
* Option 2 - to allocate funding for the vacant places below a threshold of 80% of PAN multiplied by the basic entitlement, for 3 years
* Option 3 - to allocate funding for the vacant places multiplied by 1/30th of a main scale 5 teacher for 3 years
* Option 4 - to restrict funding the vacant places to the difference between PAN and NOR for reception / Year 7 for the two years which qualified the school to be eligible for falling rolls funding, for 3 years.

4.11 **Table 3** shows the impact of each model on the current schools in the Falling Rolls Fund.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| School | Option 1£ | Option 2£ | Option 3£ | Option 4£ |
| Clavering Primary | 121,215 | 53,031 | 43,135 | 102,275 |
| Finchingfield Primary | 94,699 | 48,486 | 33,699 | 64,395 |
| Prettygate Infant | 155,306 | 45,456 | 55,267 | 136,367 |
| Wethersfield Primary | 45,456 | 19,697 | 16,176 | 22,728 |
| Tollesbury Primary | 49,243 | 7,576 | 17,524 | 30,304 |
| St John the Baptist Primary | 37,880 | 34,092 | 13,480 | 37,880 |
| Ardleigh St Mary’s Primary | 75,759 | 49,243 | 26,959 | 30,304 |
| Stourview Primary | 109,851 | 75,759 | 39,091 | 60,607 |
| Chigwell Primary | 79,547 | 22,728 | 29,309 | 33,960 |
| Dr Walker’s Primary | 178,034 | 125,760 | 65,596 | 117,427 |
| St Mary’s Hatfield Broad Oak | 94,699 | 58,335 | 33,699 | 68,183 |
| Total | **1,041,689** | **540,163** | **373,934** | **704,429** |

4.12 The current methodology costs significantly more than the other models and therefore Essex appears to be more generous than other local authorities.

4.13 FRG recommends that schools are funded using Option 2 for 2026/27 which funds the difference between 80% of PAN and the actual reception NOR. FRG also recommends that funding is restricted to a maximum 3 years as long as schools meet the falling rolls criteria. This will be applied to the current schools within the falling rolls fund, so Clavering Primary, Finchingfield Primary, Prettygate Infant and Wethersfield Primary will receive no funding from 2026/27 as 2025/26 is the third year for each school.

 **2025/26**

4.14 The schools in their third year need to meet the rising roll and balance criteria to remain within the falling rolls fund for 2025/26.**Table 4** shows whether each school meets the criteria.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| School | Oct 24 NOR | Oct 24 NOR | Change | Balance | % |
| Clavering | 168 | 183 | 15 | (44,988) | (5.66) |
| Finchingfield | 37 | 50 | 13 |  |  |
| Prettygate I | 158 | 173 | 15 | 110,852 | 13.38 |
| Wethersfield | 46 | 48 | 2 | 28,055 | 7.25 |

4.15 Wethersfield Primary is part of the Chorus Federation of Schools. The Federation has elected to receive one budget share for all schools in the federation and has therefore recorded one end of year balance which is recorded against St Gile’s Primary. Adopting the same principle to determine a balance for Wethersfield, the Federation balance has been split by pupil numbers.

4.16 Clavering Primary and Wethersfield Primary meet both the rising roll and balance criteria and are recommended by FRG to continue to receive falling rolls funding in 2025/26. Finchingfield Primary meets the rising roll criteria however the balance criteria will be assessed on the balance at 31st August 2025.

4.17 Prettygate Infant does not meet the balance criteria where for 2025/26 balances must be the greater of 8% or £91,855, which is the average balance for 1FE schools based on Annexes A and C at Agenda Item 4. FRG recommends that Prettygate Infant is removed from the falling rolls fund.

4.18 The remaining schools in the falling rolls fund will be in year 2 in 2025/26, so the NOR can still fall, so they must meet both the DfE and balances criteria. **Table 5** shows if each school meets the criteria.

|  |  |  |  |
| --- | --- | --- | --- |
| School | DfE Criteria | Balance | % |
| Chigwell Primary | Yes |  |  |
| Dr Walker’s Primary | Yes | 76,755 | 15.36 |
| Stourview CE Academy | Yes |  |  |
| St John the Baptist Primary | Yes | 67,699 | 13.93 |
| St Mary’s Primary, Ardleigh | Yes |  |  |
| Tollesbury Primary | Yes | 152,250 | 16.96 |

4.19 Dr Walker’s Primary and St John the Baptist Primary meet both the DfE criteria and the balance criteria and the are recommended by FRG to receive funding from the falling rolls fund in 2025/26.

4.20 Chigwell Primary, Stourview Primary and St Mary’s Primary, Ardleigh meet the DfE criteria however the balance criteria will be assessed on the balance at 31st August 2025.

4.21 Tollesbury Primary does not meet the balance criteria and FRG recommends that the school is removed from the falling rolls fund.

4.22 Sixteen schools met the falling rolls criteria for 2025/26, however only 6 schools met the DfE’s mandatory criteria. All 6 schools were contacted and asked to return a proforma. Stambridge Primary and Waterman Primary have both submitted their completed proformas. As both schools are academies their applications will be brought back to FRG on 10th November as academies must supply their final balance for 31st August 2025 to assess whether they meet the balance criteria.

**Hilltop Infant School**

4.23 At the last meeting of FRG on 10th December it was agreed to defer the decision on Hilltop Infant’s application to the next meeting. The school submitted the following pupil forecast.



4.24 The school meets the required two consecutive falling rolls of 4% or greater. The NOR must increase by year 3 (October 2025) which is demonstrated on the schools forecast above.

4.25 The 10 year plan shows a reduction in surplus places in reception, however, pupil numbers across the planning group are not expected to rise until 2029/30.



4.26 The Hearts Academy Trust has started to pool balances from 2023/24 and has a pooled balance of £1,245,593. A balance has been provided for Hilltop Infant at 31st August 2024 which is a surplus of £34,508 (2.8%) which meets the balance criteria.

4.27 FRG requested additional information from the Trust which is attached at Annex A. The Trust attended FRG and presented their information and answered questions.

4.28 FRG recommends that, although the Trust has provided a balance for Hilltop Infant, that the consistent approach shown at 4.3 continues to be used to determine the balance for Hilltop Infant.

4.29 Using the approach in 4.3, Hilltop Infant would have a balance of £213,000 which is too high to meet the balance criteria. FRG recommends Hilltop Infant is ineligible for falling rolls funding.

**5. Financial Implications**

5.1 Schools Forum approved a budget of £724,000 for 2025/26.

5.2 **Table 6** shows the allocations for 2025/26 and the indicative allocations for 2026/27 based on FRG’s recommended option 2.

|  |  |  |
| --- | --- | --- |
| School | 2025/26£ | 2026/27£ |
| Clavering Primary | 121,215 | 0 |
| Wethersfield Primary | 45,456 | 0 |
| Dr Walker’s Primary | 178,034 | 125,760 |
| St John the Baptist, Pebmarsh | 37,880 | 34,092 |
| Finchingfield Primary | 94,699 | 0 |
| Chigwell Primary | 79,547 | 22,728 |
| Stourview CE Academy | 109,851 | 75,759 |
| St Mary’s Primary, Ardleigh | 75,759 | 49,243 |
| Total | **742,440** | **307,582** |

5.3 The total budget requirement, subject to all academies meeting the balance criteria, is **£742,000**, which would require **£18,000** to be funded by the Schools Block surplus.

**6. Other Resource Implications**

**7. Consultation with stakeholders**

**8. Background / Supporting papers.**

8.1 Annex A – Additional information for Hilltop Infant School - Confidential

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 4** |
| Date: 21 May 2025 |  |

**REPORT TITLE: SCHOOL and ACADEMY BALANCES**

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 level of school balances held across all schools in Essex.

**2. Recommendations**

2.1 To agree a review into a select number of schools to determine why schools are holding balances and to delegate authority to the Finance Review Group to approve the schools to be included in the review.

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

3.1 There are no specific school forum powers or responsibilities in connection to school balances.

###### 4. Background

4.1 The combined balances for maintained schools and academies are **£171.3m**, which is a decrease of **£8.7m**. **Table 1** shows the balances for maintained schools as at 31st March 2025 and for academies as at 31st August 2024.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Phase | No. of Schools | Maintained School Balances at 31/03/25£000 | Academy Balances at 31/08/24£000 | Total Balances£000 |
| Nursery | 2 | 408 | 0 | 408 |
| Primary | 447 | 36,108 | 47,092 | 83,200 |
| Secondary | 79 | 3,125 | 67,119 | 70,244 |
| All-Through | 2 | 0 | 2,507 | 2,507 |
| Special | 22 | 111 | 8,691 | 8,802 |
| PRU | 6 | 1,773 | 4,327 | 6,100 |
| Total | **556** | **41,525** | **129,736** | **171,261** |

4.2 Academy balances are taken from the accounts published on the Companies House website as follows:

* Standalone academies – Unrestricted general funds + restricted general funds (excluding the pension reserve).
* Essex MATs – The Funds section lists the balances held by each school in the MAT. Also taken into account is the central services balance held by the MAT.
* Multi-Authority MATS – The balances listed for each Essex academy, plus a pro-rata share of the central services balance based on the proportion of Essex pupils within the MAT.
* Essex MATs that pool balances – the whole Trust balance is used and where there are schools in different phases the Trust balance is split between each phase based on pupil numbers.
* Multi-Authority MATs that pool balances – a pro-rata share of the Trust balance based on the proportion of Essex pupils in the MAT.

4.3 **Table 2** shows academy balances, broken down between balances held by schools, central services balances and pooled balances.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Phase | Balances held by Schools£000 | Trust Central Services£000 | Trust Pooled Funds£000 | Total Balances£000 |
| Primary | 31,779 | 282 | 15,031 | 47,092 |
| Secondary | 43,620 | 4,059 | 19,440 | 67,119 |
| All-Through | 0 | 0 | 2,507 | 2,507 |
| Special | 6,132 | (216) | 2,775 | 8,691 |
| PRU | 4,405 | (78) | 0 | 4,327 |
| Total | **85,936** | **4,047** | **39,753** | **129,736** |

4.4 **Table 3** shows the Trusts that pool balances and shows how many Essex schools are in the Trust.

|  |  |  |
| --- | --- | --- |
| **Trust** | **No. of Essex Schools** | **Total Balances****£000** |
| Academy Transformation Trust | 2 | 55 |
| Anglian Learning | 2 | 364 |
| Attain Academy Partnership | 7 | 607 |
| BMAT | 10 | 2,553 |
| Bridge Academy Trust | 11 | 6,353 |
| Canonium Learning Trust | 8 | 798 |
| Hearts Academy Trust | 6 | 1,206 |
| Inspires MAT | 5 | 832 |
| Lift Schools (formerly AET)[[1]](#footnote-1) | 10 | 5,124 |
| Loxford Schools Trust | 1 | 636 |
| NET Academies Trust | 6 | 2,607 |
| Ormiston Academies Trust | 1 | 793 |
| Saffron Academy Trust | 9 | 2,190 |
| SEAX Trust | 5 | 2,775 |
| The Chelmsford Learning Partnership | 8 | 10,280 |
| The Compass Partnership of Schools | 5 | 1,284 |
| The Eveleigh Link | 7 | 497 |
| The Learning Partnership | 3 | 746 |
| Unity Schools Partnership | 1 | 53 |
| **Total** | **107** | **39,753** |

4.5 **Table 4** shows the movement in balances for maintained schools between 2023/24 and 2024/25. The balances for all maintained schools are shown in Annex A.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Phase** | **2023/24****£000** | **2024/25****£000** | **Change****£000** | **Change****%** |
| Nursery | 235 | 408 | 174 | 74.1 |
| Primary | 35,325 | 36,108 | 783 | 2.2 |
| Secondary | 3,168 | 3,125 | (43) | (1.4) |
| Special | 2,713 | 111 | (2,602) | (95.9) |
| PRU | 1,775 | 1,773 | (2) | (0.1) |
| **Total** | **43,216** | **41,526** | **(1,690)** | **(3.9)** |

4.6 Balances for maintained schools have decreased by **£1.7m**, which is broken down as follows:

* There is a **£2.1m** reduction due to 7 schools converting to academies in 2024/25.
* Buttsbury Infant closed when amalgamating with Buttsbury Junior reducing balances by **£300,000.**
* Balances for the remaining maintained schools increased **£759,000**.

4.7 **Table 5** for maintained schools shows the number of schools by phase that had an in-year surplus or in-year deficit.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Phase** | **No. of Schools with in-year Surplus** | **£000** | **No. of Schools with in-year Deficit** | **£000** |
| Nursery | 2 | 174 | 0 | 0 |
| Primary | 106 | 5,702 | 91 | (3,990) |
| Secondary | 2 | 83 | 2 | (126) |
| Special | 2 | 192 | 3 | (1,274) |
| PRU | 2 | 143 | 1 | (145) |
| **Total** | **114** | **6,294** | **97** | **(5,535)** |

4.8 **Table 6** shows for maintained schools the number of schools in surplus and deficit. For the schools in surplus, it is also shown the number of schools above the DfE thresholds.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase | Surplus | Deficit | Surplus above DfE Threshold |
| Nursery | 2 | 0 | 1 |
| Primary | 192 | 5 | 136 |
| Secondary | 4 | 0 | 4 |
| Special | 3 | 2 | 3 |
| PRU | 3 | 0 | 3 |
| Total | **204** | **7** | **147** |

4.9 Table 6 shows there are 7 maintained schools with deficit balances, which is a decrease of 7 schools compared to 31st March 2024. There are 147 maintained schools (72.1%) above the recommended DfE threshold.

4.10 **Chart 1** shows how maintained schools plan to use their balances.

4.11 In comparison to previous years the main three categories are balancing the budget, to use in a future year and general contingency. The planned use of balances for each maintained school are shown in Annex B.

4.12 Looking back to the planned use of balances last year, balances for maintained schools should have decreased by **£22.2m** based on how schools informed the Authority they will spend their balances.

4.13 **Table 7** shows the movement in balances for academies between 2022/23 and 2023/24. The balances for each academy or Trust are shown in Annex C.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Phase | 2022/23£000 | 2023/24£000 | Change£000 | Change% |
| Primary | 46,444 | 47,092 | 648 | 1.4 |
| Secondary | 74,115 | 67,119 | (6,997) | (9.4) |
| All-Through | 1,958 | 2,507 | 548 | 28.0 |
| PRU | 4,971 | 4,327 | (643) | (12.9) |
| Special | 9,289 | 8,691 | (598) | (6.4) |
| Total | **136,777** | **129,736** | **(7,041)** | **(5.1)** |

4.14 Balances for academies have decreased by **£7 million**.

4.15 **Table 8** for academies shows the number of schools by phase that had an in-year surplus or an in-year deficit.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Phase | No. of Schools with in-year Surplus | £000 | No. of Schools with in-year Deficit | £000 | No. of Schools with no Change |
| Primary | 76 | 9,722 | 103 | (9,074) | 69 |
| Secondary | 15 | 5,339 | 38 | (12,336) | 22 |
| All-Through | 2 | 548 | 0 | 0 | 0 |
| PRU | 0 | 0 | 2 | (643) | 1 |
| Special | 4 | 926 | 5 | (1,524) | 8 |
| Total | **97** | **16,535** | **148** | **(23,577)** | **100** |

4.16 **Table 9** shows for academies the number of schools in surplus and deficit. For the schools in surplus, it is also shown the number of schools above the DfE thresholds.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Phase | Surplus | No change / Pooled | Deficit | Surplus above DfE Threshold |
| Primary | 145 | 85 | 18 | 100 |
| Secondary | 49 | 24 | 2 | 40 |
| All-Through | 0 | 2 | 0 | 0 |
| Special | 9 | 7 | 1 | 7 |
| PRU | 2 | 1 | 0 | 2 |
| Total | **205** | **119** | **21** | **149** |

4.17 Table 9 shows there are 21 academies in deficit which is an increase of 3 academies compared to the previous years. The pooling of balances has increased from 89 schools last year to 107 schools. The other 12 schools where no change is reported are schools which have converted in-year (7 schools), 2 schools that are new and no balance has been reported and 3 schools have no change in balance.

4.18 **Chart 2** shows the movement in school balances over the last 5 years.

4.19 It can be seen in Chart 2 that since 2020/21 balances have increased by **£29.4 million** (20.7%).

**5. Other Resource Implications**

**6. Consultation with stakeholders**

**7. Background / Supporting papers.**

7.1 Annex A – Maintained School Balances 2024/25

7.2 Annex B – Maintained Schools Planned Use of Balances

7.3 Annex C – Academy Balances 2023/24

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5** |
| Date: 21 May 2025 |  |

Any other business and feedback from associations and other Forum members

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5a** |
| Date: 21 May 2025 |  |

**Minutes of High Needs Review Group – Thursday 24 April 2025**

**8.30am – 8.58am**

In Attendance

|  |  |  |
| --- | --- | --- |
| Jeff Fair (Chair) (JF) | Ruth Bird (RB) | John Hunter (JH) |
| Sue Bardetti (SBa) | Pam Langmead (PL) | Michelle Steadman (MS) |
| Maggie Loveday (ML) | Robin Taverner (RT) | Carole Herman (CH) |
| Harriet Phelps-Knights (HP-K) | Scott Bowak (SBo) | Rod Lane (RL) |
|  |  |  |
| ECC Officers: | Ralph Holloway (RH) | Yannick Stupples-Whyley (YSW) |

|  |  |  |
| --- | --- | --- |
| 1 | Welcome and Apologies | JF welcomed everyone to the meeting. Apologies have been received from James Saunders |
| 2 | Top-Up Funding | RH introduced the paper setting out the proposal to fund schools from 20 weeks on an average band. Once the actual banding has been agreed the band value will be paid but the previous funding will not be corrected.SBa asked if you give a school £5,800 and an EHCP is not awarded, does the school keep the funding.RH stated the risk is really low as if an assessment is agreed, 99% result in a plan being issued.SBa replied she was thinking some schools may get it sorted by 25 weeks but I have some children on month 14.RH responded this is why we need to do this.SBa followed up do both situations get the same amount of money.RH stated that it is what has been funded from week 20 to the point the plan is complete.PL stated it sounds a good idea for school’s cashflows but presumably the number of weeks that needs assessments are completed will be reduced.RH agreed stating he needed to be realistic The table shows that we got up to 40% of plans being agreed in 20 weeks but that has fallen back as the focus is on the backlog.RT asked about the current position with EPsRH replied EP recruitment has stabilised in that EPs are staying. The workforce is in a position where there is more confidence.ML asked has any financial modelling been undertaken on the number of plans that are Band 1 and the difference this amount would be.RH responded that the financial modelling needs to be completed. It should not change the overall financial forecast but could bring forward spend to 2025/26.JF asked if payments will be monthly or termly. HP-K referred to an e-mail from Candice Thompson that stated for academies payments would be monthly. |
| 3 | Special School Split Site Funding | YSW gave a verbal update on the proposal to realign how split site funding is calculated for special schools to the methodology used for mainstream schools. A paper will be taken to July’s Forum meeting. |
| 4 | Any Other Business | None |
| 5  | Closing Comments | JF thanked everyone for attending and for their contribution to the meeting.Date of next meeting : 27 June 10am – Microsoft Teams |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5b** |
| Date: 21 May 2025 |  |

**Minutes of Finance Review Group – Thursday 24 April 2025**

**10.30am – 12.03pm**

In Attendance

|  |  |  |
| --- | --- | --- |
| Jeff Fair (JF) (Chair) | Ruth Bird (RB) | Sue Bardetti (SB) |
| Harriet Phelps-Knights (HP-K) | John Hunter (JH) | Sean Moriarty (SM) |
| Pam Langmead (PL) | Rod Lane (RL) | Carole Herman (CH) |
|  |  |  |
| By Invite: | Don Wry (DW) | Steve Clark (SCl) |
| Sarah Cox (SCo) |  |  |
|  |  |  |
| LA Officers | Yannick Stupples-Whyley (YSW) |  |

|  |  |  |
| --- | --- | --- |
| 1 | Welcome and Apologies | JF welcomed everyone to the meeting.Apologies have been received from Clare Kershaw. |
| 2 | Falling Rolls Fund 2025/26 | JF welcomed the representatives of the Hearts Academy Trust to the meeting and asked them to take FRG through the highlights of their case.DW presented the business case setting out the cause of the falling roll and the expectation the roll will increase from planned housing in the vicinity of Hilltop Infants. DW highlighted the structure of the school and the challenges that the falling roll has caused.SB asked about the percentage of the Trust’s balance compared to their funding and what percentage was the surplus quoted for Hilltop Infant as a % of their budget.YSW responded that the surplus balance quoted for Hilltop Infant was 2.8% of the school’s funding for 2023/24.SCl confirmed that the Trust balance was 14% of the Trust’s funding.SB asked for clarification of how Trusts manage balances across their schools, do schools with higher balances support other schools in financial difficulty.DW stated that the Trust adopt a GAG pooling policy but do not pool everything. Schools are expected to operate a balanced budget but from time to time some may run into a deficit. Other schools that are in surplus support those schools but we are a small Trust.JF stated we apply principles and criteria consistently to both academies and maintained schools.HP-K asked what is your confirmed new intake number. DW responded it is currently at 66.HP-K asked has the Trust considered further mitigating actions in perhaps reducing your PAN. DW stated they are looking to return to a PAN of 75.SM asked about the projected in-year surplus of £49,000 and whether the figure was correct. DW confirmed it was correct.SM responded that the projected surplus is about 4% of the budget. If you have a £49,000 how much is absorbed into the Trust and how much is available to the school. DW responded all the surplus is available to the school.JH asked with the school in surplus does the Trust need more money. Is the Trust in a position where it needs to make redundancies.DW stated the school has had to make difficult decisions to reach the surplus that is forecast.JF thanked DW for attending and answering questions and stated that the Trust will be told the outcome of FRG’s recommendation after the meeting.JF asked what are the criteria they need to meet. YSW responded that the NOR needed to have fallen by 4% for 2 consecutive years and that the balance criteria also need to be met.JF raised that one of the main queries raised was PAN. Looking at the numbers the PAN has been unrealistic.SB explained she was concerned with the overall Trust balance which at 14/15% is a decent amount of funding.JF stated that if you apply the balances criteria in the same way we do for school balances then Hilltop Infant will not meet the balance criteria. YSW replied that yes if we applied the same approach Hilltop Infant would have a balance too high to meet the balance criteria.SM stated that the distinction between pooled and non-pooled balances had no clear explanation of how it was determined.CH stated we need to back to a point of principle do we treat academies in Trusts as standalone like maintained schools or do we treat Trusts as standalone. Responsibility and due diligence is about managing the finances of all schools in the Trust.JF stated that FRG needed to look at equity in terms of how balances are handled.JH stated he was a trustee and knows that a lot of primary schools have financial pressures and are having to make staff redundant and to restructure.JF responded that the principle of the falling rolls fund is to support schools to keep capacity available for when pupil numbers increase without the need to make staff redundant.HP-K referred to the 10 year plan that shows that numbers are not going to increase significantly and therefore the capacity is not needed.HP-K questioned the number of pupils to be funded. YSW clarified how it is calculated.SM asked do we have the right to say the plan is unrealistic. JF responded this is what has started the queries.PL asked whether a loan could be offered. YSW responded that the LA cannot loan funding to academies without the permission of the Secretary of State.JF asked are there any other schools in a Trust that receive falling rolls funding. YSW responded there are 3 schools that are in a Trust.JF asked how are their balances treated. YSW responded that the Trust balance as reported on the Companies House website is divided by the number of pupils in the Trust to give a per pupil amount. This is then multiplied by the pupils in the relevant school to give a balance for that school.JF stated we should be consistent.HP-K asked if we apply a consistent approach would the school qualify for the falling rolls fund. YSW responded the balance would be in excess of £200,000, so would be too high.FRG agreed that all schools should be treated equally and therefore the approach to apportion balances for schools in Trusts should be applied to Hilltop Infant.YSW introduced the remainder of the report looking at the proposed change to how funding is distributed to schools and informed FRG on how many new schools meet the criteria for 2025/26.HP-K queried why schools reaching year three within the falling rolls fund would need a fourth year if the decision is to terminate funding after 3 years. Schools should be able to react quickly. Option 3 based on 1/30th of a teachers salary is my preferred option.JF stated if the falling rolls fund is doing its job properly it should support schools where there is a capacity problem.HP-K responded numbers are down everywhere due to the lower birth rate. We could have a huge influx.YSW responded that the 10 year plan does not support that all areas will increase within the next 3 years which is probably why the DfE has introduced their mandatory criteria where the School Capacity Plan must show the places are needed now or in the next 2 years.HP-K stated once numbers are increasing schools receive additional funding, so also giving falling rolls funding is double funding.JF responded that there are 2 years where the roll is falling, so that is hat you should be funded for.SM asked how do we tackle the problem of unrealistic PANs.YSW responded that the option that has a threshold of 85% of PAN in some ways mitigates issues of an unrealistic PAN. SM agreed and stated he was leaning towards option 2 as a way forward.SM stated the paper was curiously silent on the LA’s preference. YSW stated he had not had time to discuss the options in full but would personally choose option 2 and limit funding to 3 years.JF stated he would prefer 80% as it is a round figure for a PAN of 30.RL stated something needs to be done about unrealistic PANs. JF stated the LA is aware.HP-K questioned why do some schools see big reductions in funding in option 2. YSE explained the calculation for Prettygate Infant that showed there are only 4 vacant places above the threshold.FRG agreed to recommend to Schools Forum a variation on Option 2 to fund schools for the number of vacant places between 80% of PAN and NOR for a maximum of 3 years.FRG agreed to recommend to Schools Forum that Clavering Primary, Wethersfield Primary, Dr Walker’s Primary and St John the Baptist receive falling rolls funding for 2025/26.FRG agreed to recommend to Schools Forum that Prettygate Infant and Tollesbury Primary to be removed from the falling rolls fund for failing to meet the balance criteria.FRG noted that the applications for Stambridge Primary and Waterman Primary will be brought back to the November meeting. |
| 3 | Any Other Business | None |
| 4 | Closing Comments | JF thanked everyone for attending and for their contributions.Date of next meeting: 2 September 10.30am Microsoft Teams |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 5c** |
| Date: 21 May 2025 |  |

**School Forum Early Years Sub-group**

**MINUTES**

**Thursday 24th April 2025**

**7.00pm to 8.30pm**

**Via TEAMS**

**Attended**

Carolyn Terry, Yannick Stupples-Whyley & Sandie Leader – ECC

25 attendees – see list below

**Apologies**

* Beverley Middleton, Alec Hunter Preschool
* Kelly Stallwood, Buzzee Beez preschool
* Rhiannon Dyson, Treetops pre-school

**Review of minutes and action log**

* Minutes agreed as accurate.
* Transition paperwork - Felt transition paperwork not required, as lots do a speed dating meeting. Did put together a one-page document with specific questions.

**Schools Forum meeting feedback – 15th January 25**

* Shared early years allocation and proposed rates for 25-26 – these were agreed and subsequently shared with the sector.

**Early Years items discussed**

EHCP - EP shortage and any plans of addressing

Children potentially deferring for a year due to needs assessment not completed as no EP, not always beneficial for the child to remain at setting. One parent raising money to pay privately. Should settings contact case worker if consent from parent?

CT – Ralph Holloway has said there is a recruitment issue still nationally. ECC looking at alternative resources, agency working through the backlog. ECC are catching up with backlog constant improvement. Very few beyond 20 weeks deadline now (from when request is made).

Is it appropriate for child to defer from school? One School have said not able to meet needs and other said he could attend but left to own devices. It would be helpful to look into these 2 children’s circumstances further to see what other support could be put in place and whether the school can access IPRA (Individual Pupil Resource Allocation) funding ahead of a needs assessment being undertaken, that may lead to a statutory plan and associated funding being agreed.

CT – take offline to discuss further, to see what support can be offered for the 2 situations described.

One setting shared that they have a situation where a Zoom call will be undertaken with an EP from in Belfast for needs assessment for a child. Will need to upload video footage of the child in the setting first, will have to see how it goes.

One provider used phone to follow child for the EP to observe virtually and didn’t actually record, this actually worked well in this instance

Private EP reports – are they accepted?

CT - Depends on content. Parents should check with Essex beforehand IP, EF or case worker. Could put parents at a disadvantage if not able to afford to pay privately.

Funding Guidance

Attendee felt this was no longer needed to be discussed as a lot of information has been sent out since requesting on the agenda.

Percentage payments for full daycare providers. Why these payments can’t be split equally across the term.

The % split depends on the number of months in the term, and ECC are not able to move term dates.

Spring term appears to have been the main issue and ECC have looked at ways to calculate differently. If 3 months paid equally for the monthly payments this would lead to the need to adjust the % split for termly payment for providers, paying more up-front. Whilst this may initially seem attractive to termly paid providers, this does increase the risk that this could lead to an overpayment at forecast if the hours were overclaimed. Financial impact for provider and LA increases, for example it will not help with cashflow in the long term as a provider could find they have a very small subsequent payment later in the term or actually be in a deficit for the next term and not receive any funding.

ECC did commit to carry out a further consultation on the payment cycles in autumn term 2025, after the final rollout of 30 hours. Due to the level of queries and concerns being raised, this will now be undertaken in the summer term. Same criteria will apply as in the outcome will be bound by consultation majority response rate for each sector type – still the position that each sector type has to be paid in the same way i.e., all childminders monthly, all pre-schools termly as is the case currently - last consultation on this point generated a very high response. Please see attached Consultation outcome document.

**Early Years Updates**

Budget

Main update next meeting, but high level updates :-

* Early Years Block budget has increased from £154 million last year to £222 million, this year to reflect rollout of entitlements.
* ECC are currently submitting termly census returns as not able to do accurate forecasting.
* DfE last undertook interim census during covid, likely to continue for this financial year.

Some providers have contacted ECC on the back of FOI published by NDNA at the end of 2024 – ECC had the highest surplus. This was due to ECC being overpaid by the DfE, this was caused by some providers submitting data on both the EY & school census. ECC informed DfE and they clawed back the overpayment at year end.

DfE allowed LAs to 5% retain of allocation, now 4%, next year 3%. ECC retain approx. 0.5%

Currently we have a small surplus, will request to SF for surplus to be spent and shared with sector this year. Previously taken to SF for one off projects i.e., training, additional support, sufficiency grant, recruitment & retention access to job recruitment site rather than pay.

Surplus is ringfenced to EY block.

Childcare reforms – supplementary grant for providers providing 3 and under places

Eligible providers should have received an email regarding allocation. ECC used January census and amount allocated divided by funded hours claimed for under 3. LAs had to inform providers of allocation by 10th April. Funding will be paid to ECC end of July so will make payment July/August.

Funding should be used to help with expansion for the increase to 30 hours for working parents of children aged 2 and under – this could be training, buying resources, etc. ECC will undertake a survey to see eligible providers to gather in information on how the grant has been used as the DfE will be requesting feedback from LAs.

School based nursery funding

We are receiving complaints that the new school based nurseries are receiving a receiving a higher hourly rate than PVI settings. This is not correct, all providers offering early years funded places receive the same FEEE hourly rate. The 2 maintained nursery schools in Essex - Tanglewood & Woodcroft - receive a Maintained Nursery School supplement which is set by the DfE at a national level. Supplement is ringfenced for maintained nursery schools and if not paid to them the DfE claw the funding back.

Recruitment & Retention

Campaign has been undertaken, analysis shows that we have 700 additional practitioners in Essex, we hope the campaign has contributed to the increase.

Providers who have used website, some found very supportive. Will look for providers to have free access again this year.

Annual provider survey, will ask questions about R&R

Feedback from attendees:

* Recruitment challenge, quality of applications and expectations of work.
* Employed older apprentices worked well. Access to website useful
* Unqualified staff applying
* Fixed term contracts for maternity cover difficult to fill.
* One provider training up a member of staff through the Poppins Bursary
* Experienced based route, has it started yet? Yes, in April, Chanel to send out link. Only setting specific, cannot move settings.

**Action:** Send out information on Poppins Bursary & Experience based route – see below

[**Experience-based route for early years staff**](https://eur02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.gov.uk%2Fgovernment%2Fpublications%2Fexperience-based-route-for-early-years-staff%3Futm_medium%3Demail%26utm_campaign%3Dgovuk-notifications-topic%26utm_source%3Db0c2c56e-6fe0-40e8-9f1a-fc991de22df4%26utm_content%3Ddaily&data=05%7C02%7CFEEEQueries%40essex.gov.uk%7C360b6909590e4acca32108dd4a09ddba%7Ca8b4324f155c4215a0f17ed8cc9a992f%7C0%7C0%7C638748128419546195%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=f47rn6T%2Bm7J6yoPHAX%2BALFFgj8b3bO827f40NqOLU7U%3D&reserved=0)Page summary: How early years providers can implement the experience-based route for staff who do not hold full and relevant qualifications.

Change made: First published.

Time updated: 9:00am, 28 January 2025

Link to information on the Poppins Bursary

[New bursary supports training in Early Years | Essex County Council](https://www.essex.gov.uk/news/2024/new-bursary-supports-training-early-years)

EHC needs assessment

Already covered in meeting under Early Years items

**Items to take to the Essex Schools Forum 21st May 2025**

Chanel to take the Teachers Pay and Pension Grant (TPPG) to SF meeting to discuss further – query from group why is this only paid to schools?

Summary of position to-date: -

TPPG was originally a ringfenced supplement which was only available to schools to cover teachers’ pay and pensions. The TPPG was integrated into the Dedicated Schools Grant (DSG) Early Years Block starting from the 2024-25 financial year

This integration means that funding for teachers' pay and pensions in early years settings is now part of the core funding arrangements for LAs. This meant LAs and Schools Forums had to decide on how to allocate this going forward.

The financial analysis showed that if this was added to hourly rate for all providers it equated to less than 1p per funded hour. A consultation was undertaken with the sector on the approach and the outcome of this was taken to the SF meeting. The SF members discussed the changes and were committed to setting a principle that no sector types should be unreasonably disadvantaged by changes to supplements paid to LA, and on that basis agreed to create a TPPG supplement that would be paid in the same way for which it had originally been provided for, and this would be an ongoing annual supplement.

TPPG is only paid for qualified teachers who are in a school nursery and therefore paid on Teachers pay and conditions, it is not paid for any support staff.

PVI may employ staff with qualified teacher status, but these will not be being paid on teachers’ pay and conditions and therefore not eligible for the TPPG supplement.

For comparison for the FY 2024 / 2025, if paid to all settings offering FEEE3&4 this would equate to 0.04 pence per funded hour (£22.80 per full time 15-hour place for 38 weeks) whereas the schools who were paid TPPG were paid £176.70 per full time 15-hour place for 38 weeks.

Requested copy of membership % for schools forum

**Action:** Provide DfE guidance Schools Forum Operational and good practice guide

**AOB**

Terms of Reference – new members

3 emails to remind to complete ToR have been sent. Decision made to remove members from contact list if not returned.

If do not attend 3 meetings in a row, Schools Forum members are removed.

**Action:** Sandie to collate a list of vacancies and sent to Chanel and Helen

HCRG contract

In process of starting procurement of HCRG contract. Early engagement sessions to hear from stakeholders about service to be offered. 12th May TEAMs workshop, would be good to have EY providers attend

**Action:** Send out early engagement sessions information to subgroup

DfE advert about School Nurseries

Can ECC relay to DfE that the advert was not equitable for all sectors. ECC have already made a point about the advertising. Suggestions given on how to balance the view of this. Portfolio lead for Essex has provided quotes for press enquiries to balance response to adverts. PVI are greatly valued in Essex.

**Date of next meeting –** 12th June 20257.00-8.30pm via TEAMs

**Future dates –** 4th September & 6th November

**Attendees**

Ruth Edwards The Treehouse

Sam Cottrill The Colourwheel Montesorri

Claire Macklin Christ Church Preschool

Maggie Catmull Richmond Preschool

Chanel Lassman Safari Childcare

Dawn Saunders Wivenhoe Park Day Nursery

Helen Taylor Tiddlywinks Preschool

Claire Owers Bright Stars Preschool

Catherine Hamilton Little Sunbeams Epping

Annalei Smith Roydon Preschool CIC

Lisa Rozee Roydon Preschool CIC

Sharlin Paul Childminder

Gaynor Baker Buzzee Beez Preschool

Linda Reynolds Home from Home Childcarers

Angie Owen Tolleshunt D'Arcy Preschool

Vicki Wellen Tolleshunt D’Arcy Preschool

Donna Thresher The Hullbridge Preschool

Zoe Orr Harwich Connexions Noahs Nursery

Laura Gant Walton Preschool

Jackie Popjoy Walton Preschool

Angie Craig Yellow Brick Rd Nursery

Sophie Rice Oakey Dokeys Preschool

Tina Carnegie-Dielhem Whipper-Snappers Day Care Nursery

Michelle Wisbey Westwood Montessori

Debs Watson Tanglewood Nursery

**Action Log**

|  |  |  |  |
| --- | --- | --- | --- |
| Action | Action for | Date to be completed | Action completed |
| Send out information on Poppins Bursary & Experience based route | Sandie/Chanel | 2nd May | Sent in minutes |
| Provide DfE guidance Schools Forum Operational and good practice guide | Sandie/Yannick | 2nd May | Sent with minutes |
| Collate a list of vacancies and sent to Chanel and Helen | Sandie | 2nd May | 29/4/25 |
| Send out early engagement sessions information to subgroup | Sandie | 2nd May | Sent with minutes |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 6** |
| Date: 21 May 2025 |  |

**Schools Forum Meeting Minutes of 15th January 2025**

**held via Microsoft Teams**

**08:30 am – 10:40 am**

*(subject to forum approval)*

In Attendance

|  |  |  |
| --- | --- | --- |
| Ruth Bird – Chair | Charlotte Little (CL) | Jody Gee (JGe) |
| Jeff Fair (JF) | Carole Herman (CH) | Stuart Roberts (SR) |
| James Saunders (JaS) | Nigel Hill (NH) | Maggie Loveday (ML) |
| Don Wry (DW) | Marilyn Smith (MSm) | Sue Bardetti (SBa) |
| John Hunter (JH) | Harriet Phelps-Knights (HP-K) | Natalie Christie (NC) |
| Jennifer Grotier (JG) | Pam Langmead (PL) | Michelle Steadman (MSt) |
| Rod Lane (RL) | Lydia Sherborne (LS) | Jinnie Nichols (JN) |
| Scott Bowak (SB) | Ferliene Willis (FW) | Polly Lankester (PLK) |
| Robin Taverner (RT) | Jo Santinelli (JO) | Chanel Lassman (CL) |
| Sean Moriarty (SM) |  |  |
|  |  |  |
| **LA Officers** |  |  |
| Yannick Stupples-Whyley (YSW) | Andrew Page (AP) | Cllr Tony Ball (TB) |
|  |  |  |
| **Observer:** Kim Cannon (KC), Juniper Education |  |  |

|  |  |
| --- | --- |
| **1.** | **Apologies for Absence and substitute notices** Apologies were received from Clare Kershaw, Emily Welton and Val Cleare.RB welcomed Ferliene Willis who joins Schools Forum as the maintained nursery school member and Polly Lankester, Saffron Walden County High School who is the new Secondary Academy Headteacher member.Louise Johnson substituted for Don Wry at 10 am.RB welcomed Kim Cannon from Juniper Education as an observer. |
| **2.** | **Falling Rolls Fund 2024/25 (Jeff Fair/Yannick Stupples-Whyley)**JF introduced as this paper had been looked at by the Finance Review Group. One of our tasks was to look at the applications for the Falling Rolls Fund. Before the last meeting we felt we needed to revise the criteria of the Falling Rolls Fund to ensure it is still fit for purpose given the changing circumstances and the experiences that we were having. There are a couple of changes that are included in this report. The first one is under 4.8, where we are looking at the number and the role should we recommend and should be reviewed and looked at, and propose the changes so that the criteria for small schools is more appropriate to infant, junior or primary. We have just got a single criteria of less than 210, but we are moving towards a more refined criteria depending upon size of schools because an infant score of 19 may not actually be anything in terms of size or greater than 90, but less than 210. There is a grading criteria for the numbers on roles and percentages that remain the same, but the number of pupils actually within the school have changed. Similar criteria changes are being proposed for the balances in terms of looking at grading in terms of the number of pupils inside, the infants and juniors, as well as looking at the primary. There is also some clarification about balances of schools and using a similar agreed procedure with the DfE in dividing up the balances, the total pooled balance between pupils, dividing them into their individual establishments, and they are using that balance that is appropriate for that particular school to ensure equity. We have recommended to the Local Authority to review this to see if there is a better way of looking at the structure. It is unusual that we would be looking at Agenda Item 3 which is the funding arrangements for next year. But this paper has an implication for next year’s budget. JF was very grateful to the scrutiny that members of the FRG have given to this and the whole process. YSW presented the report to the Forum the recommendations of the 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.If we go straight to 4.7 this shows the current criteria Falling Rolls Fund. The main change is for 4.8 breaking down the first point in 4.7, so the FRG felt particularly with junior schools there were quite a few junior schools that are quite large and therefore could potentially cope with a Falling Roll like other larger schools, more than small schools can. The main change to the criteria is for both infant and junior schools. FRG is recommending:* 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 showed the current balance criteria. The proposed change is in 4.10 based on the changes in 4.8. In terms of rebalance, should be less than or equal to an average balance for small schools or 8% of the relevant budget share, whichever is the greater that would apply to infant schools with up to 90 people junior with up to 120 and probably up to 210.Then infant schools with 91 or greater 121 or greater and primary 211 greater would be the 8% secondary school, the 5%. Then we have a change around trust that pool balances. We would calculate an average balance per sector. If it was just a primary trust, it would be an average balance. If it is a trust with both primary and secondary, using pro-rata pupil numbers, we would calculate an average balance, then that would be applied to if it is a primary, 8% if it is a secondary 5%. The 5 and 8% come from the recommended DfE level of balances YSW needs to change it, if approved would come in from April 2025.Then, as Jeff had mentioned, there is also concern that FRG around the published admission number for some schools that does not reflect the actual intake and therefore in using the plan to calculate allocation for schools may result in some schools getting higher funding that they might not need. FRG is recommending that we review how we actually fund the schools once they are in the Falling Rolls Fund. If that is approved, that will come forward to the May Forum. Applications that we have received from Chigwell primary and Hilltop Infant Chigwell has a panel of 30, but also admits an additional 15 pupils into year three. They had requested that the additional intake of year three was also included in the calculation of the funding. However, FRG have reviewed the agreement with Annex A and could not clearly see that year three within taking additional 15 pupils, and also concerned with the school’s plan. Therefore, the recommendation is only to consider the reception intake in line with other schools. In terms of Hilltop Infants have requested additional information which YSW will be contacting the trust after this meeting, and then they will also be invited to the next meeting of the FRG, and again that will come forward to the May’s Forum. FRG recommend that Chigwell Primary will receive **£31,973** based on the reception panel only to be approved. But if a Falling Rolls Fund is **£866,000**? Based on the decisions made so far, just under **£739,000** has been approved. Chigwell Primary is approved today. We will take that up to **£770,000** which is less than the budget. The surplus budget would be carried forward to next year. In terms of the 2025/26 allocation, they are all based on the provisional keys, basic ENT type. For primary which is in the next paper and then Annex A shows the breakdown of the application for Chigwell Primary in terms of their numbers meeting your plan. Then it does say what the funding is for both. If you include year three intake and just using the reception intake, which is a recommendation of **£31,973**.Don Wry mentioned at 7.7 it says that 16 schools met the falling criteria for next year. What is the date/timeline for when schools will be notified if they are one of these schools?JF informed Alex said it is starting from April 2025. JF clarified it is the present people applications that are from April 2025. Not this current funding round that is financial year. YSW stated in terms of Hilltop Infants he has already applied. They will be based on the **£2,425** criteria. Only schools applying for **£2,520** sixth revenue criteria will come in. **Recommendations:**Forum agreed the recommendation of FRG to approve the revised falling roll criteria at 4.8.**Voting**: Majority support.Forum agreed the recommendation of FRG to approve the revised balance criteria at 4.10.**Voting**: Majority support.Forum agreed the recommendation of FRG that a review of how funding is allocated to schools is reviewed at 4.12.**Voting**: Majority support.Forum agreed the recommendation of FRG that Chigwell Primary receives funding from the falling rolls fund at 4.16.**Voting**: Majority support.Forum agreed the recommendation of FRG to approve the funding shown in Table 2 at 5.2.**Voting**: Majority support. |
| **3.** | **DSG Budget 2024/25 (Yannick Stupples-Whyley)**YSW provided Forum with an update on the DSG funding settlement, the funding assumptions built into the budget and sought Forum’s agreement to the budget.Table 1 in 3.1 shows the schools operation, a good practice guide which says out of all your SRT schools, former Secretary of State in September schools’ budget. It breaks down all of the functions and the role of each of the Local Authority, Schools Forum and the DfE. It can be seen under Schools Forum there is text in blue which shows either the consultation has already happened in term of formula change and the movement on the 0.5%. If we look at Central Spend on criteria for allocating growth fund volume was fund. It can be seen that did in 5.10 and 7.5 respectively. This shows that all of the decisions have either already been covered or in this paper. **Background**The school funding settlement was announced on 18th December 2024. Total increase is **£4.3billion** at the national level, of which **£2billion** is for Early Years, **£1.3billion** for Schools Block and **£1billion** for High Needs Block.Table 2 shows there is from a revised baseline which brings in the three pay and pension grants that are coming into DST for 2025/26, so that changes the baseline for 2024/25. In terms of these changes, there is **£118million** increase, **£24.6million** in the Schools Block decrease, and where the Central School Services Block **£21.8million** in behind this block and **£72million** in the Early Years Block. Overall, that is a 7.2% change compared to baseline. DSG is still provisional, is funded on five twelfths and seven twelfths of the January 2025 Census and January 2026 Census respectively. Also, some of the Early Years Block entitlement is also funded termly, so the new under two’s and the two-year-old working parents as they are extending to 30 hours in September. Until all that data is collected on a census and they are telling us things that has to be put in and then behind this block, the import export adjustment is also based on the January 2025 Census so that is still provisional. Figure 1 shows how the Schools Block is calculated. We have a primary unit of funding and a secondary unit of funding which are **£537,912** and **£6,984.41** respectively. These are set at the time of the provisional settlement and they stay at that value. Then they are multiplied by the24th October Census. We then add on Premises funding growth and Falling Rolls Funding which gives the total schoolbook allocation. Premises funding is provided at a level of funding delegated to schools in the previous year, with the exception of PFI, where the baseline will continue to be uplifted in line with the retail price index inflation. Then the Growth Fund is calculated at a middle super output area preschool. The 2023 October Census is deducted from the 2024 October Census, and where there is positive growth within each MFO area, a net positive growth funding is allocated. Similarly, the same MFO areas for the Falling Wealth Fund. Then if each of the emitters, if they have a net reduction of at least 10% Falling Rolls, funding is allocated. We have already said about the teachers’ pay pension, employee contribution grant and recall schools budget grants are coming into DSG for 2025/26. The PFI factor had a slight amendment in terms of within the NFF, they have now created a baseline for NFF, so they take the lower of the PFI premises factor of the Local Authority’s 2024/25 or the schools NFS Tracker, then no increase and whichever is the lowest by the inflation, then there has been a technical change to the specified factor for schools emerging of amalgamating. So, schools who merge or amalgamate, as long as it is not 1st April, get a lump sum protection for up to two years. Once that has ceased, the split site funding will come in if applicable.4.11 – of the **£26.4million** increase, **£10.5million** comes from increase in the NFF factors, **£16.4million** comes from additional 5 months’ worth of funding from the core schools budget grant because it was only 7 months’ worth in 2024/25. Overall pupil numbers have gone down, primarily have decreased by 323 pupils. Secondary has gone up by **£187,000**. That reduction of **£136,000**, which is a reduction of **£434,000**. Premises funding increased by **£727,000**, growth fund goes down **£2.5million**. The Falling Rolls Fund increases by **£150,000**.The Central School Services Block is calculated by using ongoing responsibilities and historic commitments. The ongoing responsibilities element of the CSSB is funding on a per pupil element for a per pupil amount, and this also includes central services for all schools which came from the former Education services grant. So, funding increases by **£352,000**, and this is mainly due because we increased costs of central licences for schools that the DfE purchases on behalf of all schools. Then the historic commitment element was **£3.8million** in 2024/25. The DfE are now wanting down historic commitments, and we do see allocated by 20% each year. That has reduced the funding by **£761,000**. Overall, there is a reduction of **£409,000** within Central School Services Block.Figure 3 is quite small, but it showed how the High Needs Block is calculated. Information in the middle of the table shows that if any funding is increasing by less than 7%, offered by the funding floor. Funding is going up between 7 and 10% then you get what the High Needs gives you, then if your funding is going up by 10% or more, then there is a gains limit factor to bring it down 10% flow of our **£21.8million** increase. **£1.4million** comes from an additional 289 special school places and then out of a **£1billion** increase, our share is **£20.4million**.Figure 4 shows how the Early Years Block is calculated.**Growth Fund**Table 7 shows growth places funded by varying pupil numbers. There is an overall reduction of 168 pupils.AP believed there is a need to do an insight analysis and will bring that to the FRG.YSW stated in terms of 7.6 a proforma will be sent to the 16 schools. Then for academies they will be asked to provide an estimate of their balance. For maintained schools, we will take their balance in early April for 31/3/25.Then we will calculate which schools meet the balance criteria. We will ask the academies for an updated balance sheet on them closing their accounts on 1/8/25, and that will probably go to November for agreement on academies.**PFI Affordability Gap**8.1, Table 9 shows indicative school contributions for Facilities Management costs for 2024/25.Table 10 shows the affordability gap for each scheme.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 cross a number of years to mitigate the impact on schools.There was significant inflation within each PFI scheme in 2022/23 and 2023/24 which for Debden was inaccessible 11%.**School Funding 2025/26 - Exceptional Premises Factor**9.1/9.2, This was agreed by Forum in May 2018 to recover the cost of buying out the performing PPP contract. The authority is required to apply for this application to use an exception premises factor for 2025/26 and to consult with schools for them. This consultation is because the DfE only decided very late that this application will be required for 2025/26, and it is now going to be required annually.Effectively the funding is **£12.9million** as in the previous year, although the DfE have actually approved this application, but still need to sort of need Schools Forum approval as backup should they come back and to ensure everything is in place.**Delegated Budgets**9.3, The Authority is required to submit the Authority proforma which sets out how schools will be funded in 2025/26 to the Education and Skills Funding Agency (ESFA). This paper assumes that the Secretary of State will agree a 1% transfer. We are still awaiting that decision. If the Secretary of State were to come back and say no, then it would be 0.5% transfer that Schools Forum agreed at the last meeting. 9.4, In 2023/24 the Essex Formula fully transferred to the Schools National Funding Formula. Essex mirrors the NFF in all factors except the KS4 basic entitlement. At the last meeting Schools Forum agreed that if we could, we would use any of the bullet points in 9.5 to meet requirements of NFF. In 9.6 it shows what we have actually done. We have had to fund all factors with the exception of basic entitlement at the minimum value, allow for 2025/26 KS3, KS4 basic entitlement has moved from 1.01 to 1.18321 to 1.15, minimum funding guarantee has been set at -0.5% which is the lowest level allowed. All these changes at 9.6 are made to ensure that we can fully fund the minimum per pupil levels, and we are making these changes. We would have also had to put in this application to fund MPPL at a lower level.Table 11 shows the total funding to be delegated to primary and secondary schools in 2025/26, i.e., **£641.6million** for primary, and **£590.5million** for secondary.Premature retirement costs were agreed.4.18-4.21 has covered funding coming into Early Years Block and the changes for 2025/26Table 12 shows the proposed hourly rate that we funded in 2025/26. Two-year old families receiving additional support that would be £8.16 which is a 16p increase. Two-year old families is 11p increase. An allowance for deprivation within the two-year funding, the DfE has encouraged with Local Authorities to have. We are passporting a minimum of 97.5%. Some blocks are higher but the lowest is 97.5%.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 25th September Early Years inclusion fund estimated to be **£3million** for 2025/26. To mitigate the impact of the sector it is proposed to fund **£2million** from the Early Years Block in 2025/26, and £1million from the Early Years Block surplus balance and then it will be fully funded from 2026/27 from the earliest block allocation. It can be seen under Item 7 that the current forecast surplus balance is **£8.2million**. The allocation is based on the January 2024 Census. It then gets updated for both January 2025 and January 2026 Censuses.Table 13 shows how funding is distributed across each factor for 2025/26. It can be seen that primary is increasing by **£40.8million**, and secondary by just **£40.3million**. The biggest increases are within basic entitlement deprivation, free school meals and for primary the lump sum. These are the three elements that we use to roll the pay and pension grants into DSD. That is why we would expect big increases in those factors. Table 14 shows the professional basic entitlement for 2025/26. Primary goes up to **£5,315.52** for KS3 and **£6,112.84** for KS4. The minimum funding guarantee has been set at 0.5%.Table 15 shows the number of schools that required MFG protection, which has increased from 38 to 304. With the people number decline and also the fact that MANUFACT has reduced from +0.5% to -0.5%.10.7, the Minimum Per Pupil Level (MPPL) of **£4,995** for primary and **£6,465** for secondary have been fully implemented.Table 16 shows the number of proposed Central Expenditure for the Early Years Block and the Central School Services Block for 2025/26. There is a slight reduction in Central Expenditure for Early Years of **£16,000**. Central School Services – key changes are between statutory, duties and potential borrowing. You will be aware that the 10-year SEND, and capital programme contributions have come to an end, and that is why prudence borrowing decreases from 3.8 to zero. But additional funding coming in that the DfE wanting to have this commitment has been placed for the current time on the contingency, primarily most of the **£3.5million** increase. The rest is mainly increasing the amount of inflation and then licence for schools. There was an increase in the licence for schools in 2024/25. DfE, however, said there will be an increase in 2025/26 which will help provide some additional funding. There was additional funding in 2024/25. It was insufficient to fund the increase. We expect the funding coming in 2025/26 will be tax free insufficient as well.**High Needs Block**12, Table 18 shows the proposed allocation of the HNB for 2025/26. It shows that even with a **£21.8million** increase, there is a **£24.8million** forecast overspend for 2025.26.General Item 7 shows that there is an in-year forecasting overspend of **£24.8million** which is accumulated deficit of **£12.7million** with a 1% transfer from the Schools Block plus a **£1million** transfer from the Central Schools Block, there still remains a deficit of **£24.1million** at the end of 2025/26. We have discussed the cost previously. Table 19, shows a revised forecast for High Needs Block, so as have said, **£24.1million** at the end of 2025/26. Then, if nothing changes, would increase to **£69.5million** in 2026, **£139million** in 2027 and **£243.1million** in 2028/29.It is expected that the statutory override for DSD will end on 31/3/26 and by then no DfE DSD deficit will be separated from Local Authorities accounts. This will place immediate pressure on the general fund of **£13million**. It should also be noted that reduced cash balance at **£243million** to fund the High Needs Block deficit by 2028/29 will directly impact the Authorities’ cash balance. Should it be required to borrow to fund ADSD deficit, that borrowing cannot be charged or costed. The borrowing cannot be charged to an education school grant. It is Local Authority cost. Section 13 shows risks and opportunities.The budget is built on known assumptions and pressures identified so far. See Table 20.YSW spoke about issues we have with the Falling Rolls Fund. It needs to be affordable. At the moment we are managing to contain it within the funding allocated or within the Schools Block centres, balance obviously, continuing to use the school’s book surplus balance that would deplete eventually and get to where it is not available. If more schools are qualifying, we would have to ask schools for them to approve the reduction in terms of the amount delegated. RB asked, how does the growing High Needs Block deficit compare to other counties?YSW responded that we are beyond the growth in terms of a number of Local Authorities going into deficit. There are a large number of deficits. Across the country it is already into **£1000,000,000 plus**. Some authorities have gone potentially over **£300million** into deficit. Some went into, what is known as a safety valve scheme, but that is now ended. There was also a delivering better value programme with that the DfE put in place, but again that has ended. Local Authorities were waiting to see what comes forward from the DfE in terms of additional funding or changes to regulations in terms of responsibilities for High Needs going forward in terms of what provision is going to be funded and maybe how that will be funded. RB reminded that YSW said he would notify as soon as the rates come in for pupil premium.YSW reported the people premium for mainstream is separate to the Early Years people premium. The Early Years people premium forms part of the Early Years Block. That one has been announced as part of the Early Years Block notification. YSW presumed that the DfE is working on what is affordable going forward. SR referred to 10.8, Table 16.YSW had noted the minimum per pupil level funding at a slight increase of 105 schools to 131 that need protection and that is actually an increase of 25%. SR wondered, is there concern that is a reflection of lower funding and is there concern that is an on-going trend?YSW responded, obviously, an increase in any of them is a concern. The Local Authority will always want schools to be funded at their formula level rather than needing protection from minimum per pupil or minimum funding guarantee. Obviously, funding in the Schools Block compared to other blocks, it has not been a big increase for 2025/26. As other things change and funding is not going up at the same level, then you are likely to see more schools going in. Part of it will be due to the transfer as well.AP added to what YSW had said about the question on financial turbulence. For maintained schools the Local Authority will be supporting those maintained schools and keeping an eye on those costly forecasts that will come in. We will be providing that advice and guidance there with regards to how we compare with other counties. Then other counties are already in the position that we could be in in 2028/29. AP indicated there are some significant overspends of over two £300million already on the books. YSW has already mentioned about the statutory override. They are not at the moment and that is due to finish in 2026. It will be interesting to see what stance the Government takes by 2026. Because if that does finish and those deficits are then reported on Local Authority balance sheets, then that will put significant strain on authorities and perhaps invoke Section 114. There is some decision making that needs to be taken with Central Government as to what is going to be happening. Their first step is the additional **£1billion**. But if there needs to be further thought as to the decisions about how we look at the demand that continues to flow through, and that you have seen already with our demand is going to grow and grow. HPK asked YSW, has there been any information about whether there will be any contribution towards the increased National Insurance that we are having to pay out now? Is that going to be funded? Is there any information around that?SM had a question around Early Years funding and referred to 9.12. As SM understood it, the overall Early Years Block is **£226million**. That paragraph suggests all but 2½% of that **£226million** is going to the Early Years Block. SM also said by his calculation 2½% of that **£226million** is **£5.65million**, but the figure of retained cost there is **£3.7million**.YSW responded there is a calculation of the DfE we have to follow, and you now have to calculate on each of the blocks. Effectively, you put in what you are funding in terms of your hourly rate, your estimate to take up and that gives an allocation of funding. You then add in any additional funding you are provided through any of the supplements.Central expenditure is excluded, so effectively you add in any supplements and add in any funding you have provided for Early Years Inclusion Fund. That then gives them an hourly rate that you are funding. You then compare that to the DfE hourly rate and whatever percentage of the DfE hourly rate that they have provided in that percentage. We have to fund 96% of whatever is the DfE hourly rate for that block.SM noted it stated that the local Tory had to passport up to 96%. This figure is 97½% and at the risk of antagonising his Early Years colleagues at a time when budgets are so tight, but this particular area has got an **£8million** surplus going into the year.SM asked, was there not scope in this area for further support for the High Needs Block deficit being given through the Early Years Block?YSW stated at the moment we have moved the inclusion fund from behind new block to earlier block.SM recognised this.YSW indicated, obviously, there has been movement in 2024/25. Therefore, cash shows that the movement can be mitigated. However, depending on the January 2025 Census, will show wherever they can mitigate that transfer or not. If it cannot be mitigated, then that will have an impact on the **£8.2million** that it will reduce. SM merely asked the question because he anticipated colleagues within the main school’s area thinking why so much pressure on us when there is another area of funding which, historically, appears to be in surplus, but that is fine. SM’s other point was, see Table 18 and 12.1 which shows the sort of provisional, proposed allocations of the Higher Needs Block. Looking at these two lines, this is where effectively the deficit is coming. Independent schools going up by **£10.78million**, and other alternative provision going up by **£13million**.SM mentioned that independent schools were a law unto themselves, although he believed AP would disagree. It is clearly the area where the Local Authorities could be focusing and the follow-on question for that is what it encompasses within the phrase other alternative provision, because that is now becoming an increase of nearly 150%.YSW responded, essentially this is a provision that is not in school. It will be provided through the IPES contract which some of it can be more than one, but a lot of it can be 1:1 provision. It is other people who are excluded, and we cannot find alternative provision in another school. Also, pupils cannot go to school for specific reasons, i.e., mental health prevents them from being able to go to school and therefore they might require a 1:1 provision. This type of provision costs a lot more. SM thanked YSW for answering the question. However, the question SM then asked, what sort of moderation takes place to assess the appropriateness and validity of all of this? Because this disappears to be expended to this out of control. AP indicated Sean is right. They are our two big independent schools which is biggest cost driver. It is 5% of the population and 20% of the budget. Alternative provision is very much catching that up as well. We need to make sure to resurrect that Independent Schools Working Group that we have got, and we need to continue work on that.We are looking at a procurement of independent schools, but there is also potential that there could be a number of pupils ageing out. There is lots of work that we need to do, and we are not working on it as much as we can. But because of sufficiency, we are relying on the use of independent schools.SM thought one thing that was positive is following on from that, every time Ralph Holloway has been contributing to Schools Forum, he is giving examples of where the provision can be provided within schools. It is more effective, both financially and on the children themselves, but that is really where the focus has got to be.AP confirmed that RH is looking at whether we can create those enhanced provisions. Also, we have the inclusion framework, which is working very well, and we need to scale that up, but those take time. We need to understand that they do definitely work, and to understand that evidence takes time.JF felt it is also a reflection about the positioning on the deficit findings in that the investor process which started 15 years ago or 16 years ago looking at provision of additional special needs schools which is all part of the process. It is a long-term effect because one of the difficulties, which RH would agree with if he was present, that once you have got an investor in a special school, it is virtually impossible. Independent school is virtually impossible to get them out because of parental choice. The majority of the pupils who are in independent placements have got there because parents have appealed, gone through an appeals process, and have actually looked at that so that the ability for the Local Authority to do very much is sometimes quite restricted by the legislation that the Government has put in place. JF added the alternative provision placements, we have heard quite regularly, that the PRU’s are full because of the need that is going on and a bit like some of our special schools, are working significantly over allocation, over capacity to try and mitigate circumstances somewhere on the line that as a group of all schools together, we have to find ways of working smarter that actually enable schools to support each other. Because, ultimately, this money which will end up coming out of education budgets somewhere. If you look at the income or expenses of the High Needs Block, a significant part of that ends up back in the mainstream sector. We might not think that an additional **£4,000** funding per place is good value in terms of additional school places, but at least that is not only **£4,000** extra income coming in because we have got more successful school places, or entitlement because of high needs or special enhanced provision which is actually less expensive as a result because we are actually funding a place in Essex for ourselves.It was noted that RH has been working on it. But it is this bit that says it has not been involved in looking at the innovative ways of trying to actually encourage ourselves to find smart ways of dealing with this. SB stated this has been really worrying her for quite some time. SB has a pupil at the moment who has had to go to another provision. When SB visited this child the last time, SB sent with another member of staff to see how things were going. SB felt if she had some of that funding put into her school, she probably could have kept that child. She probably would not have needed to send that child anywhere or needed alternative provision.SB felt a lot of money is being pumped into different provisions and if schools had some of that finance or extra finances that maybe could do something differently within the school, but when we are not offered that.RB read out a message from Polly Lankester:Have the changes to private schools VAT had an impact yet on new demand?YSW was not aware of any.**Action**: YSW to try and find out.JF suggested one of the things for SB is part of the rationale between the banding exercise that has been going on is actually trying to enable better funding to be put into schools to support schools.SB commented she has been asked to re-band children to put them lower. If they are too high, we have very good evidence that they are not. Cllr Ball gave a bit of context and background. Cllr Ball stated when it comes to parents saying to us, they cannot afford the private school fees, it has been relatively small compared to some other Councils such as Hampshire, Surrey and Kent. The hot spots are Colchester, Chelmsford etc.We have been able to accommodate with places but what we do not know is whether people have decided to home educate their children rather than go into the state sector. There is not a great clamour for school places because of the VAT on private schools.Cllr Ball was trying to recall where we had a long discussion, when we were at Hamptons, on independent provision versus state provision for special schools to certainly stand, and colleagues may recall, the figure was over £60,000 per place in the independent special school sector as opposed to 30 something. It was £1,000 per place within the state school. This is probably about a year out of date now. We need to build more places, because all our state special schools are full or over capacity but with parental choice. Cllr Ball made a statement if it is determined that only a special school is the appropriate place for their child, then whether or not mainstream school says it can. Sometimes there are not any mainstream schools that can meet the need of the child. Then we go through a tribunal and the tribunal will instruct a school, special school or an independent school to take that child. That is where there is no control. Cllr Ball informed we are building more statistical places such as Sir Geoff Hurst school and The Hawthorns school plus some expansions and provisions. On the inclusion framework we have run 1010 pilots. Outcomes have been very encouraging of children with EHCP’s. We have seen an increase in requests from these assessments of around 140% in recent years for EHCP’s.**Recommendations:*** Forum noted the DSG Settlement for 2025/26 at 4.3;
* Forum noted the funding for the PFI Affordability Gap at 8.2
* Forum noted the total delegation for primary and secondary schools at 9.8
* Forum noted the proposed allocation of the High Needs Block at 12.1
* Forum noted the risks and opportunities at 13.1
* Forum agreed the funding for the Growth Fund at 5.10
* Forum agreed the funding for the Falling Rolls Fund at 7.5
* Forum agreed to cap gains at 0.5% to meet the requirements of NFF for 2025/26 at 9.6
* Forum agreed 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
* Forum agreed the funding rates for early years providers at 9.10
* Forum agreed that £1m of the Early Years Inclusion Fund is funded from the Early Years surplus balance at 9.13, and
* Forum agreed the central expenditure for the Central School Services Block and Early Years Block at 11.1.
 |
| **4.** | **Any other business, feedback from schools through Associations and from Schools Forum representatives on other Bodies.****ASHE**CH reported there are continued concerns about funding. One of the issues, other than those as presented by YSW, is the fact that the pay award was not fully funded, and this continues to be a concern for schools.We are all looking at the implications of the Children’s Wellbeing and Schools Bill. Also, noted things that were in the manifesto, which are not yet represented. Manifesto commitments around Early Years, around recruitment and inclusion.We are focusing on the implications of social care and safeguarding breakfast clubs in uniform, the expansion of teacher regulations and standards, change to academy regulations and also the school admissions and the Local Authority involvement in that. We are looking to understand the implications for schools. Also, issues around SEN which was part of funding discussions this morning. There has been work going on for a long time in association with Ralph Holloway and his team about the fact that we are trying to make sure that money is not going into the independent sector but our capacity within the state school sector is sufficient. The implications are that mainstream schools are having to do more and meeting the needs of higher needs of young people coming into schools. All this takes time, training, resources and sometimes building facilities capacity as well. We have got some good examples across the county such as Beauchamps. However, RH is aware of lots of areas in schools where there is capacity.CH spoke about young people within schools or not in schools, the elective home education issues which has gone up exponentially. Also, there is the issue of young people being put back into schools just in time to do their exams when they have not been educated by the school. All this is added pressure for several terms or years. There is also pressure around the Fair Access Protocol and whether that is fit for purpose, obviously parental choice. CH mentioned about meeting a group of US Ashe Council members who are meeting with Shamsun Noor, Head of Education Operations, this afternoon to look at what might be able to be done with the Fair Access Protocol.Recruitment continues to be an issue and will continue to be. **EPHA**HPK informed we have the same pressure from SEND impact on workloads, recruitment and retention, particularly to support staff and obvious worries about finances. Headteachers are reporting a significant increase in workloads impacting on themselves and also their staff in relation to managing attendance and the related paperwork has added a huge burden to schools. As well as the breakfast club and wraparound care requirements, there are concerns around the up-and-coming budget, including the question HPK asked about National Insurance contributions and the fact that pay awards were not fully funded. Schools are waiting on a number of decisions around budgets, SEND reforms. HPK and PL attended a new group, the National Teachers’ Association Network, and there were 12 different counties represented and the focus of that will be engagement with Local Authorities. What different associations are doing to engage schools and just working together to have a bigger voice, so that we are able to lobby. It was very proactive, and we think it will be an inclusive approach.**ESSET**JG explained that primary outreach has finally been rolled out and this began in October. JG reported this has really been well-received and very beneficial. We have had a really positive response. We have got funding for 5 terms, which would cease 31/3/26. We are going to look to put in another bid sometime in the summer. We have got a bit more capacity with some of our special schools providing more staff.Pressure on places is very unreal. Just the sheer number of consultations and we started panel in the North-East of the county in September 2023. We originally had one per month but in the autumn term we had six, and just to meet up with the demand. We have committed for the Local Authority to place children within 12 weeks. Recruitment and retention continues to be a big issue.JG felt that the Sufficiency Strategy is too little, too late. JG quoted we will need 600 special school places. Budget pressures are also a concern. JG mentioned how empty some of the properties are when we could be filling them with 50 or 60 pupils. There is a desperate need for those places rather than having to pay out of county prices which are hugely expensive for Essex children.**PRU’s**Michelle Steadman covers the South provision and West for medical education. MSt summarised in the South, we were looking for 29 permanent exclusions across primary and secondary before Christmas. The challenges in alternative provision are ensuring children are in the correct provision and meeting the need moving forwards. We have a huge focus on re-integration to mainstream. With regards to medical provision, we now offer 90 places and we are increasing looking to offer more innovative solutions to support the Local Authority in terms of some really diverse needs. We have really complex timetables for children, given the variety of needs. We are feeling the huge pressures around managing attendance accurately. We take pathway students, i.e., children with HCP’s with SEMH needs and staff are facing quite challenging moments with dysregulated behaviours and associated issues within the family homes. We are looking to trial some innovative solutions to support mainstream schools. For example, a short-term 6-week placements where children come into us, we work therapeutically, behaviourally and educationally. We then look to re-integrate them to mainstream.Sue Bardetti spoke about support placements. MSt stated these are only for a fixed term placement, maybe one or two terms. Where MSt had been talking about children that are permanently excluded from schools. MSt was referring to children in Years 7, 8, and 9 who we would then look to re-integrate back to mainstream school on a trial placement. These are second chances for children who are permanently excluded, particularly at KS3.SBa mentioned about the EHCP situation that is probably due to the fact that they are taking so long to go through 18 months, 2 years before getting an EHCP.**Early Years**FW echoed the issues that people have already described around SEND and funding from an early age perspective. FW felt it would be interesting to see what the take up is like and the impact on the last roll out of Government initiative for 30 hours funding from 2-year-olds and how that will look for demands on places. Likewise in future years FW would be -interested to see how that will affect disadvantaged children because there is a fear that it will further widen the gap for these children.CL added the same issues echoed about recruitment and retention. The National Insurance is a massive increase. We are looking about **£100,000** increase across the board and that does not include any other increases not associated with staffing costs. CL stated Early Years are classed as PVI’s but sometimes we come under a government subsidised area where it seems to suit and other times not, and maybe this point could be raised. There is still an issue about the number of nurseries that seem to be closing year on year. CL quoted 199 provisions closed from 24th September to the start of this academic year, which is down only slightly on the 216 which closed the previous year. **ESGA**RL added we have been informed about a number of nurseries who financially cannot continue. RL also mentioned about the fiasco over the reorganisation of Local Government. **Unions**MSm stated we have got continuing concerns over education budgets and the impact of this on young people’s learning. Obviously, the ongoing impact on staff and due to staffing levels, there is budget, staff retention etc.JF mentioned from the teacher’s side, at least one of the unions is going out to an indicative ballot about the funding for the 2025 pay rise rounds with the lack of any funding being identified within the budgets. JF said he could find a figure which indicates that more funding has been given to schools that is greater than the anticipated 2.8% increase. Looking at the long-term, the situation from the members’ perspective is that there is a decreasing ability of staff to actually manage. We are not positive about the current situation driven by the budget, but also driven by the pressure that then puts on schools to try and manage their structures within the finances they have got.**Church Reps**No report.**High Needs Review Group** – Group has not met.**Finance Review Group** – Group has met, and this was discussed under Items 2 and 3.**Early Years Minutes** – Group has not met.**Any Other Business** - None. |
| **5.** | **Minutes of 27th November 2024 (Chair) – see Page 38.**The minutes were agreed as a true record.There were no matters arising. |
| **6.** | **Minutes Action Log (Yannick Stupples-Whyley)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 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 |

 |
| **7.** | **Third Quarter Budget Update 2024/25 (Yannick Stupples-Whyley)**YSW updated the Forum on the forecast outturn position for the year-ended 31st March 2024 for both the Schools Budget and Education Functions.Under 4.2 YSW reported the total to Educated Schools Grants forecast for 2024.25 after academy recruitment is **£662.3million** and we are forecasting spend at Period 8 of **£37.5million**. That therefore pushes the overall DSG balance into a **£1.1million** deficit. Schools Block **£491,000** overspend. This is due to funding agreed for the Growth Fund for 2024.25. This was the additional fund, different growth fund for 2024/25. It will come from the surplus balance in terms of when we use the surplus balance at the year-end. Central School Services Block **£42,000** overspend. This is the cost of the national licence purchased by the DfE, so they have increased by **£166,000** and we have received additional funding of **£113,000**. It does not fully fund the increases.The **£24,000,000** overspend behind this block, we have **£19.7million** in top up funding for maintained schools, academies and post 16FE. This is due to increase in demand and also increase in the average cost of banding as more people are being awarded higher bands. Top up funding for independent provider. This is forecasting at **£2.7million** overspend. This is due to both price and demand. Support Services for Customers **£2.6million** underspend is due to the High Needs Block contingency that we are funding exceeded the budget initially when we started the year, a second year where the deficit payment has been deferred and the agreement of Schools Forum to transfer expenditure of yearly is inclusion fund to the Earlier Block. This is partially offset by increased staffing costs for specialised teaching teams, an increase in demand for individual pupil resulting agreements and a reinstatement of a recharge when all that was commitment to the education psychologist.Alternative provision is forecasting **£4.2million** overspend again due to increase in pupils receiving individual pupil education support. Support for Inclusion is forecasting **£275,000** underspend due to vacant posts in the quadrant inclusion partner teams.Direct payment is forecasting **£245,000** overspend due to increased demand for personal budgets from parents. There is a very high risk behind this block overspent will increase over remaining months of a financial year. Early Years plus **£13million** overspend. Previously announced DfE clawback of **£8.5million** for 2023/24 in July last year and then in November they confirmed clawback of **£4.4million** where 66 schools are claimed both on the earlier Census and the school Census. Terms of education functions Table 3 and Table 4 show the budgets agreed back in September 2023 for all schools and for maintained schools.Table 4 is subject to academy recruitment when maintained schools converted. There have been 6 schools converted to date, so some small reductions to those budgets are shown in Table 5 and then Table 6 shows our forecast out to a position which at the moment is **£8,000** overspend. The overspend through traditional business support costs which are offset by saving vacancies.The annex breaks down the outturn in Section 251 classification in how we report the budget and out into DfE.**Recommendation:**The Forum noted the forecast outturn position for the year ended 31st March 2024. |
| **8.** | **Forward Plan (Yannick Stupples-Whyley)**YSW read this out and confirmed the dates of future meetings.**Recommendations****The Forum noted the dates of future meetings\*\*****The additional items as proposed by Schools Forum were included in the Forward Plan.****\*\*It was noted there are only 2 items for the July meeting and it was proposed to cancel the July meeting.****\*\*It was noted the date for the September meeting was 24th September but due to unavailability of Hamptons, this date may be brought forward to a week earlier on 17th September 2025.** |
| **9.** | **Chair’s Closing Comments (Ruth Bird)**RB thanked everyone for attending this meeting and we will see everyone again in May. |
|  |  |
|  | **Next Meeting** **Wednesday, 21st May 2025 at 8.30 a.m. – IN PERSON****At Hamptons Sports & Leisure.** |
|  | **Dates of Future Meetings****Wednesday, 9th July 2025 at 8.30 a.m. – Microsoft Teams – CANCEL THIS MEETING?****Wednesday, 17th 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.** |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 7** |
| Date: 21 May 2025 |  |

**REPORT TITLE: Minute Action Log**

Report by Yannick Stupples-Whyley

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 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. | An update is included in Agenda Item 2 | 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 is not proposing to clawback interest on maintained school balances. | Complete |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 8** |
| Date: 21 May 2025 |  |

**REPORT TITLE: SCHOOLS BUDGET & EDUCATION FUNCTIONS BUDGET PROVISIONAL OUTTURN 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 provisional 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 provisional 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 provisional outturn for 2024/25 is set out at Annex A.

4.2 The total Dedicated Schools Grant (DSG) received for 2024/25 after academy recoupment is **£674.3m**.

4.3 The DSG provisional overspend for 2024/25 is **£34.6m**. **Table 2** shows the overall DSG balance at 31st March 2025.



4.4 The significant variations contributing to the outturn position are:

**Schools Block - £504,000 overspend**

4.5 The 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.

 **Central School Services Block - £176,000 underspend**

4.6 The CSSB contingency underspent by **£196,000** mainly as a result of additional funding of **£113,000** for the increased cost of national licences for schools. The actual cost of the national licences purchased by the DfE have significantly increased in 2024/25 resulting in an over spend of **£166,000**. Other underspends include fewer strategic support projects funded than expected, **£134,000** and due to an increase in level 3 safeguarding income **£49,000**.

 **High Needs Block - £23m overspend**

4.7 Top-up funding for maintained schools, academies and Post 16 FE - **£19.8m 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 - **£396,000 overspend** due to increases in demand and cost.

4.9 SEN Support Services - **£5.1m underspend** which is due to the HNB contingency where funding exceeded the budget set **£1.9m**, a further 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 **£309,000**, and an increase in demand for individual pupil resourcing agreements (IPRA) **£395,000**.

4.10 Other Alternative Provision - **£9.3m overspend** due to an increase in pupils receiving individual pupil educational support.

4.11 Support for Inclusion - **£1.1m underspend** which is due to the following. The outreach project did not start until September so the **£1.3m** underspend will be carried forward to fund the remaining costs from 1 April to 31 August 2025. Vacant posts in the Inclusion Partner Teams resulted in a **£324,000** underspend. This is offset through charging assistant educational psychologists to the High Needs Block for non-statutory duties **£400,000** and an overspend on the Inclusion Framework as more projects have been supported **£84,000**.

4.12 Direct Payments - **£291,000** **overspend** due to increased demand for personal budgets.

4.13 SEND Therapies - **£615,000 underspend** due to the Speech Link Pilot not going ahead as planned in 2024/25.

 **Early Years Block** – **£11.3m overspend**

4.14 In July 2024 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.

4.16 The take-up of early years funded places - **£2m underspend** as the number of places taken up is less than the places funded by the DfE. It is expected the underspend will be clawed back by the DfE in the July adjustment.

 **Education Functions**

4.17 **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** |

4.18 **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 | 2,042 |
| School Improvement | 416 |
|  | **2,710** |

4.19 The funding shown in Table 4 is subject to academy recoupment when maintained schools covert to academies. **Table 5** shows the impact for the 7 schools that have converted in 2024/25.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Asset Management£ | Statutory & Regulatory Duties£ | School Improvement£ |
| Original Budget | 252,478 | 2,042,033 | 415,687 |
| Recoupment | (1,000) | (2,370) | (1,643) |
| Revised Budget | 251,478 | 2,039,663 | 414,044 |

4.20 **Table 6** shows the provisional outturn position for Education Functions 2024/25 which is a **£34,000** overspend.

|  |  |  |  |
| --- | --- | --- | --- |
| Education Functions | Budget£000 | ForecastOutturn£000 | Variance£000 |
| Education Welfare | 1,566 | 1,580 | 14 |
| Strategic Management | 1,155 | 1,260 | 105 |
| Asset Management – all schools | 359 | 359 | 0 |
| Asset Management – maintained schools | 251 | 251 | 0 |
| Statutory & Regulatory Duties | 2,040 | 1,989 | (51) |
| School Improvement | 414 | 380 | (34) |
| Total | **5,785** | **5,819** | **34** |

4.21 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**



|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 9** |
| Date 21 May 2025 |  |

**REPORT TITLE: SCHOOL FUNDING UPDATE 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 on the recent announcements of funding rates for the Pupil Premium and additional funding for the increase to the employer NI contribution.
	2. To update Schools Forum of the findings from benchmarking DSG funding against other local authorities.

**2. Recommendations**

2.1 To note the updates.

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

3.1 There are no Schools Forum power or responsibilities concerning other grant funding or the benchmarking of school funding.

###### 4. Additional Grant Funding 2025/26

4.1 The DfE announced the Pupil Premium rates for 2025/26 on 18th March, which are shown in **Table 1**.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | 2024/25£ | 2025/26£ | Increase£ | Increase% |
| Primary FSM6 | 1,480 | 1,515 | 35 | 2.4 |
| Secondary FSM6 | 1,050 | 1,075 | 25 | 2.4 |
| Looked after Children | 2,570 | 2,630 | 60 | 2.3 |
| Children previously looked after | 2,570 | 2,630 | 60 | 2.3 |
| Service Pupil Premium | 340 | 350 | 10 | 2.9 |

4.2 The DfE also announced on 18th March the National Insurance Contributions Support Package for schools.

4.3 Mainstream schools will receive funding based on the funding rates shown in **Table 2** Schools with special education resource provision units will receive additional funding.

|  |  |
| --- | --- |
|  | £ |
| Basic per Pupil – Primary | 78 |
| Basic per Pupil – KS3 | 68 |
| Basic per Pupil – KS4 | 77 |
| FSM6 per Eligible Pupil – Primary | 75 |
| FSM6 per Eligible Pupil – Secondary | 60 |
| Lump Sum | 2,400 |
| Special Education Resource Provision 2024/25 academic year places | 119 |
| Special Education Resource Provision 2025/26 academic year places | 167 |

4.4 The funding will be multiplied by the relevant area cost adjustment for each school. Academies will receive 5/12ths of the full year equivalent NI Contribution Grant for April 2026 to August 2026. For example, the funding rate for Basic per Pupil – Primary is £33 for the period April to August 2026. The funding for mainstream schools will be incorporated in the Schools NFF in 2026/27, however the DfE is still to decide whether the funding for special education resource provisions will continue in 2026/27.

4.5 Special schools, pupil referral units, alternative provision academies / free schools and independent schools will receive funding through the Core Schools Budget Grant (CSBG). The CSBG in 2025/26 also incorporates the Teachers’ Pay Additional Grant (TPAG), the Teachers’ Pension Employers Contribution Grant and CSBG grants from 2024/25. The funding rates payable are shown in **Table 3**.

|  |  |  |
| --- | --- | --- |
|  | Special Schools / PRUs and AP Academies and Free Schools£ | Independent Schools£ |
| TPAG | 446 | 0 |
| TPECG | 595 | 595 |
| CSBG | 1,013 | 1,013 |
|  | **2,054** | **1,608** |
| NI Contributions | 496 | 496 |

4.6 The funding rates in Table 3 are multiplied by the number of places in each setting and then the relevant area cost adjustment is applied.

4.7 Early years settings in mainstream schools, governor-run nursery schools and maintained nursery schools will receive additional funding. **Table 4** shows the rates payable per part time equivalent pupil (PTE) for 2025/26.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Under 2s£ | 2-Year Olds£ | 3- & 4-Year Olds£ |
| Per PTE | 108 | 82 | 59 |

4.8 The DfE will fund **£155m** nationally for post-16 education. The plan is to distribute the income in proportion to relevant funding or income. There will be 3 elements of the post-16 NI Contribution Grant.

* 16 to 19
* Non 16 to 19 funded students and apprentices
* Local authority centrally employed teachers and centrally employed support staff.

Allocations for post-16 education will be published in May.

**5. Other Resource Implications**

**6. Consultation with stakeholders**

**7. Background / Supporting papers.**

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 10** |
| Date: 21 May 2025 |  |

**REPORT TITLE: CONSTITUTION and MEMBERSHIP OF SCHOOLS FORUM**

Report by Yannick Stupples-Whyley

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

**1. Purpose of report**

* 1. To consider the current membership of the Schools Forum in the light of the continuing transfer of maintained schools to the Academy sector and the change in pupil numbers.

**2. Recommendations**

2.1 To note that no changes are required to membership of Schools Forum.

2.2 To note in Table 5 the members whose current term ends in the next 12 months.

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

3.1 **Table 1** shows the relevant responsibilities that Forum has in relation to the Schools Forum, 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 |
| Membership: length of office – Decides | None – but good practice to get Forum’s view | None |
| Voting Procedures – None | Determines | None |
| Chair of Schools Forum – facilitates | Elects | None |

###### 4. Background

4.1 Schools Forum approved a mix of both in-person and remote meetings at the May 2021 meeting following the change to the Schools Forum Regulations allowing the use of remote meetings on a permanent basis.

4.2 At the meeting of 17 May 2023 Schools Forum approved to move the in-person meeting from January to May on a permanent basis. Should an in-person meeting be cancelled the Authority will where applicable change the next remote meeting to an in-person meeting. The usual pattern of meetings are shown below:

* May – in person
* July – remote
* September – in person
* November – remote
* January – remote

4.3 All sub-group meetings will be held remotely.

4.4 **Table 2** shows the agreed structure Forum approved in December 2020:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Maintained Schools | Academies | Total |
| Primary | 5 | 5 | 10 |
| Secondary | 1 | 6 | 7 |
| Special | 1 | 1 | 2 |
| PRUs | 1 | 1 | 2 |
| Nursery | 1 | - | 1 |
| Non School Members |  |  | 6 |
| Total | **9** | **13** | **28** |

4.5 **Table 3** shows the ratio of pupils between primary and secondary schools as at the January Census 2025.

|  |  |  |
| --- | --- | --- |
|  | Pupils | Ratio |
| Primary | 119,157 | 1.42 |
| Secondary | 84,031 | 1.00 |

4.6 The ratio between primary and secondary pupils is 1.42:1 which requires no change to the number of primary and secondary representatives.

4.7 **Table 4** shows a breakdown of pupils for primary and secondary between maintained schools and academies as at the January Census 2024.

|  |  |  |  |
| --- | --- | --- | --- |
|  | No. of Schools | Pupils | % Split |
| PrimaryMaintainedAcademiesTotal Primary | 197248**445** | 50,60268,555**119,157** | 42.5%57.5%**100.0%** |
| SecondaryMaintainedAcademiesTotal Secondary | 477[[2]](#footnote-2)**81** | 3,85678,157**84,031** | 4.6%95.4%**100.0%** |

4.8 The split of primary pupils between maintained schools and academies requires 4 maintained members and 6 academy members.

4.9 A full list of members is shown in Annex A

4.10 **Table 5** shows the members who within the next twelve months will reach the end of their current term of office. Members are allowed to stand for another 4 year term.

|  |  |
| --- | --- |
| Name | Last Meeting |
| Jinnie Nichols | 24th September 2025 |
| Marilyn Smith | 24th September 2025 |
| Harriet Phelps-Knights | 20th May 2026 |
| Chanel Lassman | 20th May 2026 |

4.12 Details of attendance are shown at Annex B for Schools Forum, the SEN Sub-Group, the Finance Review Group and the Early Years Sub-Group.

**5. Financial Implications**

5.1 There are no financial implications.

**6. Other Resource Implications**

**Annex A** - **School Forum Members (May 2025)**

 **Maintained Schools:**

**Primary School Headteachers**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Sue Bardetti | Holland Haven Primary School | November 2021 to November 2025 |
| Jinnie Nichols | St Giles’ & St Andrew’s CE Primary Schools | September 2021 to September 2025 |

**Primary School Governors**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Vacant |  |  |
| Vacant |  |  |

**Secondary School Governors**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Sean Moriarty | St Benedict’s Catholic College | November 2022 to November 2026 |

**Special School Headteachers**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Maggie Loveday | The Edith Borthwick School | January 2025 to January 2029 |

**Pupil Referral Units**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Michelle Steadman | CSS South | September 2024 to September 2028 |

**Maintained Nursery Schools**

|  |  |  |
| --- | --- | --- |
| **Name** | **School** | **Term of Membership** |
| Ferliene Willis | Woodcroft Nursery School | January 2025 to January 2029 |

**Academies / Free Schools:**

**Primary**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Robin Taverner | St Mary’s Primary, Woodham | July 2022 to July 2026 |
| Rod Lane | Lakelands Primary School | January 2023 to January 2027 |
| Harriet Phelps-Knights | Janet Duke Primary School | May 2022 to May 2026 |
| Vacant |  |  |
| John Hunter | Felmore Primary | September 2023 to September 2027 |
| Don Wry | Hearts Academy Trust | September 2024 to September 2028 |

**Secondary**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Ruth Bird (Chair) | The Chelmsford Learning Partnership | January 2023 to January 2027 |
| Natalie Christie | Passmores Academy | September 2024 to September 2028 |
| Stuart Roberts | Shenfield High School | July 2022 to July 2026 |
| James Saunders | Honywood School | November 2022 to November 2026 |
| Polly Lankester | Saffron Walden County High | January 2025 to January 2029 |
| Jody Gee | Anglo European School | November 2022 to November 2026 |

**Special**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Jennifer Grotier | Hope Learning Community | September 2024 to September 2028 |

**Pupil Referral Units**

|  |  |  |
| --- | --- | --- |
| **Name** | **School / MAT** | **Term of Membership** |
| Lydia Sherborne | Keys Co-operative Academy Trust | September 2024 to September 2028 |

**Non-School Members**

|  |  |  |
| --- | --- | --- |
| **Name** | **Representation** | **Term of Membership** |
| Jeff Fair (Vice-Chair) | Teaching Unions Rep | January 2022 to January 2026 |
| Scott Bowak | 16-19 teaching institutions | January 2023 to January 2027 |
| Charlotte Little | Anglican Church Rep | May 2023 to May 2027 |
| Jo Santinelli | Roman Catholic Church Rep | November 2024 to November 2028 |
| Chanel Lassman | PVI | May 2022 to May 2026 |
| Marilyn Smith | Support Staff Unions Rep | September 2021 to September 2025 |

**Annex B**

**School Forum Attendance**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **10th July 2024** | **25h Sep 2024** | **27th Nov 2024** | **15th Jan 2025** | **% Attendance** | **% Attendance incl. Sub** |
| Ruth Bird (Chair) | Yes | Yes | Yes | Yes | 100 | 100 |
| Jeff Fair (Vice – Chair) | Yes | Yes | Yes | Yes | 100 | 100 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 | 100 |
| Jinnie Nichols | Yes | Sub | Yes | Yes | 75 | 100 |
| Nigel Hill | Yes | Yes | Yes | Yes | 100 | 100 |
| Claire Styles | Yes | Yes | Yes | No | 75 | 75 |
| Sean Moriarty | Yes | No | Yes | Yes | 75 | 75 |
| Maggie Loveday |  |  |  | Yes | 100 | 100 |
| Michelle Steadman |  | Yes | Sub | Yes | 67 | 100 |
| Ferliene Willis |  |  |  | Yes | 100 | 100 |
| Harriet Phelps-Knights | Yes | Yes | Yes | Yes | 100 | 100 |
| John Hunter | Yes | No | Yes | Yes | 75 | 75 |
| Rod Lane | Yes | Yes | Yes | Yes | 100 | 100 |
| Robin Taverner | Yes | No | Yes | Yes | 75 | 75 |
| Don Wry |  | Yes | Yes | Yes | 100 | 100 |
| Polly Lankester |  |  |  | Yes | 100 | 100 |
| Natalie Christie |  | Yes | Yes | Yes | 100 | 100 |
| Jennifer Grotier |  | Yes | Yes | Yes | 100 | 100 |
| Jody Gee | Yes | Yes | Yes | Yes | 100 | 100 |
| James Saunders | Sub | Yes | Yes | Yes | 75 | 100 |
| Stuart Roberts | Yes | Yes | Yes | Yes | 100 | 100 |
| Lydia Sherborne |  | No | No | Yes | 33 | 33 |
| Chanel Lassman | No | No | Sub | Yes | 25 | 50 |
| Marilyn Smith | Yes | Yes | Yes | Yes | 100 | 100 |
| Charlotte Little | No | No | Yes | Yes | 50 | 50 |
| Jo Santinelli | No | No | Yes | Yes | 50 | 50 |
| Scott Bowak | No | Yes | Yes | Yes | 75 | 75 |

**High Needs Review Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **17th June 2024** | **11th Sept****2024** | **5th Nov 2024** | **24th Apr****2025** | **% Attendance** |
| Jeff Fair (Chair) | Yes | Yes | Yes | Yes | 100 |
| Rod Lane | Yes | Yes | No | Yes | 75 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 |
| Harriet Phelps-Knights | Yes | No | Yes | Yes | 75 |
| John Hunter | Yes | Yes | Yes | Yes | 100 |
| Pam Langmead | Yes | Yes | No | Yes | 75 |
| Claire Styles | Yes | Yes | Yes |  | 100 |
| Robin Taverner |  |  |  | Yes | 100 |
| Ruth Bird | Yes | Yes | Yes | Yes | 100 |
| James Saunders |  |  |  | No | 0 |
| Carole Herman | Yes | Yes | Yes | Yes | 100 |
| Maggie Loveday |  |  |  | Yes | 100 |
| Jennifer Grotier |  | Yes | No | No | 33 |
| Lydia Sherborne |  | Yes | Yes | No | 67 |
| Michelle Steadman |  | Yes | Yes | Yes | 100 |
| Scott Bowak  | No | No | Yes | Yes | 50 |

**Finance Review Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **11th Sept 2024** | **5th Nov 2024** | **10th Dec 2024** | **24th Apr 2025** | **% Attendance** |
| Jeff Fair (Chair) | Yes | Yes | Yes | Yes | 100 |
| Rod Lane | Yes | No | No | Yes | 50 |
| Sue Bardetti | Yes | Yes | Yes | Yes | 100 |
| Harriet Phelps-Knights | No | Yes | Yes | Yes | 75 |
| John Hunter | Yes | Yes | Yes | Yes | 100 |
| Nigel Hill | Yes | Yes | Yes |  | 100 |
| Pam Langmead | Yes | No | Yes | Yes | 75 |
| Ruth Bird | Yes | Yes | Yes | Yes | 100 |
| Sean Moriarty | Yes | Yes | Yes | Yes | 100 |
| Carole Herman | Yes | Yes | Yes | Yes | 100 |

**Early Years Sub-Group Attendance**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **13th June 2024** | **5th Sept 2024** | **7th Nov 2024** | **24th Apr 2025** | **% Attendance** |
| Chanel Lassman (Chair) | Yes | Yes | No | Yes | 75 |
| Rod Lane[[3]](#footnote-3) | Yes | No | No | No | 25 |
| Ruth Bird | No | Yes | No | No | 25 |
| Maggie Catmull | No | No | Yes | Yes | 50 |
| Helen Taylor (Vice-Chair) | No | No | Yes | Yes | 50 |
| Annalei Smith | Yes | Yes | Yes | Yes | 100 |
| Lisa Rozee | Yes | Yes | Yes | Yes | 100 |
| Linda Reynolds | Yes | Yes | Yes | Yes | 100 |
| Kelly Stallwood | No | Yes | Yes | No | 50 |
| Tina Carnegie- Dielhenn | No | No | Yes | Yes | 50 |
| Debs Watson |  |  |  | Yes | 100 |
| Catherine Hamilton | Yes | Yes | Yes | Yes | 100 |
| Claire Owers | Yes | Yes | Yes | Yes | 100 |
| Michelle Wisbey | Yes | No | Yes | Yes | 75 |
| Dawn Saunders | Yes | Yes | Yes | Yes | 100 |
| Michelle Boreham | No | Yes | No | No | 25 |
| Claire Macklin | No | No | No | Yes | 25 |
| Gaynor Baker | No | Yes | Yes | Yes | 75 |
| Angie Owen | Yes | No | Yes | Yes | 75 |
| Ruth Edwards | Yes | Yes | No | Yes | 50 |
| Angie Craig | No | No | No | Yes | 25 |
| Jackie Pobjoy | No | No | Yes | Yes | 50 |
| Laura Grant | No | No | Yes | Yes | 50 |
| Sam Cottrill | No | No | No | Yes | 25 |
| Sharlin Paul | No | No | No | Yes | 25 |
| Vicki Wellen | No | No | No | Yes | 25 |
| Donna Thresher | No | No | No | Yes | 25 |
| Zoe Orr | No | No | No | Yes | 25 |
| Sophie Rice | No | No | No | Yes | 25 |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 11** |
| Date: 21 May 2025 |  |

**REPORT TITLE: Forward Plan**

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 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) |

|  |  |
| --- | --- |
| **Date of Schools Forum** | **Agenda Items** |
| Wednesday 9th July 2025 | Allocation of SEN Top-Up Funding (D) |
| (Microsoft Teams) | Split Site Funding for Special Schools (D) |
|  | High Needs Block Forecast & DSG Management Plan (I) |
|  | First Quarter Schools Budget & Education Functions Update 2025/26 (I) |
|  |  |
| **Wednesday 17th September 2025** | Half Year Schools Budget & Education Functions Update 2025/26 (I) |
| (Hamptons Sports & Leisure) | Scheme for Financing Schools (D) |
|  | DSG Provisional Settlement 2026/27 including school funding consultation (D) |
|  | DSG Management Plan (D/I) |
|  | Impact of Outreach Project (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 - School Meals Advisory Service (I) |
|  |  |
| Wednesday 14th January 2026 | DSG Budget 2026/27 (D) |
| (Microsoft Teams) | Third Quarter Schools Budget & Education Functions Update 2025/26 (I) |
|  | DSG Management Plan (D/I) |
|  | Impact OF Early Intervention Strategies (D/I) |
|  | Election of Chair / Vice-Chair |
|  |  |
| Wednesday 20th May 2026 | Falling Rolls Fund (D) |
| (In Person tbc) | Schools Budget & Education Functions Draft Outturn 2025/26 (I) |
|  | School and Academy Balances (I) |
|  | Constitution and Membership of Schools Forum (D/I) |
|  | Early Years and Childcare Update (D/I) |
|  | Update on School Funding 2026/27 |
|  | DSG Management Plan / SEND Early Intervention Strategies |
|  | DSG Benchmarking 2026/26 |

|  |  |
| --- | --- |
| Schools Forum | **Agenda Item 12** |
| Date: 21 May 2025 |  |

**REPORT TITLE: Election of Chair and Vice-Chair**

1. Lift Schools has 12 Essex Academies however the Trust is required to publish the balances of Columbus and Pioneer special schools. [↑](#footnote-ref-1)
2. The All-through schools are reflected in the total number of secondary schools but for each all-through school their pupils are split between primary and secondary. [↑](#footnote-ref-2)
3. Rod Lane has been unable to attend due to illness. [↑](#footnote-ref-3)