

Schools Forum

19th October 2023 16:00-17:30 via MS Teams

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Item No	Title of Report	Decision/ Discussion/ Update	Officer(s)	Paper(s)
1.	Apologies		SH	
2.	Declarations of Interest		SH	
3.	Minutes of the meeting held on 29.06.23 and Matters Arising		SH	
4.	Vice Chair Nominations		SH	
5.	Scheme for Financing Schools	Update	SP	Included
6.	2023-24 DSG Forecast Outturn	Update	SP	Included
7.	2024-25 National Funding Formula (incl. 2024-25 Minimum Funding Guarantee)	Update	SP	Included
	7.1) 2024-25 Central Schools Services Block	Update /Decision	SP	Included
8.	2024-25 De-delegation	Update	SP/JD	Included
	8.1) 2024-25 De-delegation	Decision	SP/JD	Included
	8.2) 2024-25 Former ESG Services	Decision	SP/JD	Included
9.	2024-25 Formula Factor Criteria - Split Sites, Growth Factor and Falling Rolls	Update	SP/JD	Included
10.	High Needs Block Review	Update	KF	Included
11.	Schools in Financial Difficulty Panel	Update	NM	Verbal
12.	APT Deadline – Future Meeting			
13.	AOB: - Proposed Use of Carried Forward DSG Underspend for new arrivals from Israel and Gaza	Decision	NM	Included

	- Next Meeting Thursday 25 January 2024		SH	
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SCHOOLS FORUM
MINUTES OF THE MEETING HELD ON THURSDAY 29 JUNE 2023

Membership	Name	Phase	School	HT/Gov	End Date
Maintained	*Luke Bridges	Primary	All Saints CE, N20	HT	30/11/24
Maintained	*Ziz Chater	Primary	Martin Primary	HT	30/11/24
Maintained	*Simon Horne (C)	Secondary	Friern Barnet	HT	18/01/24
Maintained	*Sarah Sands	Primary	Garden Suburb Infants	HT	30/11/24
Maintained	Anthony Vorou	Primary	St John's CE, N11	Gov	18/01/24
Maintained	*Harvey Freeman	Primary	Hasmonean Primary	Gov	18/01/24
Maintained	Chaya Posen	Primary	Noam School	HT	07/07/24
Maintained	*Jackie Menczer	Primary	Menorah Primary	HT	03/02/26
Maintained	*Liz Longworth	Primary	Northside	HT	31/12/24
Maintained	Sarah Maltese	Primary	St Pauls N11	HT	31/12/24
Maintained	Ian Phillips	Primary	Squires Lane Learning Fed.	Gov	30/03/26
Academy	*Dan Hawkins	Primary	Childs Hill, Claremont Fed	HT	31/12/24
Academy	Clare Wagner	Secondary	Henrietta Barnett	HT	31/12/24
Academy	*Sian Morris	Primary	The Hyde Prim. Acad.	HT	07/10/24
Academy	Claire Barnes	Secondary	Ark Pioneer	Gov	31/12/24
Academy	*Marc Lewis (Sub for Gavin Smith)	Secondary	Wren Academy	HT	30/11/24
Academy	*Matthew Stevens	Secondary	Saracens	HT	30/11/24
Academy	Robin Archibald	Primary	Broadfields Academy	HT	30/11/24
Academy	*John Bowra	Secondary	Chris's College Finchley	Gov	18/01/24
Academy	*Violet Walker	Secondary	Queen Elizabeth Girls' School	HT	31/12/24
Special	*Ian Kingham	Special Academy	Oak Lodge	Dp HT	18/01/24
Special	Gilbert Knight (VC)	Special Maintained	Oakleigh	Gov	18/01/24
EY	*Ben Hasan	Maintained Nursery	Moss Hall Nursery	HT	07/12/25
EY	Sarah Vipond	PVI	Middx University Nursery		18/01/24
PRU	*Joanne Kelly	PRU	PRUs	HT	18/01/24
Post-16	*Kate James	Post-16	Barnet & Southgate College	HT	30/05/26
Trade Union	*Keith Nason	Trade Union	National Education Union		18/01/24

Non-Members:

- *Cllr Pauline CoakleyWebb, Chair of Children, Education & Safeguarding Committee
- *Ben Thomas, Strategic Lead, Barnet LA (Local Authority)
- *Neil Marlow, Chief Executive and Director of Education and Learning, Barnet Education and Learning Service (BELS)
- *Karen Flanagan, Director of SEND & Inclusion (BELS)
- Alison Dawes, Director of School Access, Skills & Corporate Services
- *Sharon Palma, Head of Finance
- *Richard Cox, Interim Dedicated Schools Grant (DSG) Finance Manager
- *George Peradigou, Clerk
- *Peter Gray, Strategic Services for Children and Young People (SSCYP)
- *Penny Richardson, Strategic Services for Children and Young People (SSCYP)

*Denotes present

1 WELCOME TO NEW MEMBERS

The Chair welcomed members to the meeting and extended a special welcome to Kate James, from Barnet and Southgate College, who had recently been elected to represent Post 16 provision.

The following membership updates were also noted:

- Gilbert Knight was no longer a governor at Oakleigh and therefore no longer a member of the forum.
- Sarah Maltese had informed the Clerk that she would be stepping down from her role as Headteacher of St Paul's N11 at the end of term, meaning she would no longer be a member of the forum.
- Ben Hasan had informed the Clerk that he would retire at the end of the current term.
- Luke Bridges from All Saints CE N20 was stepping down as Headteacher.
- Marc Lewis, who had substituted for Gavin Smith at Wren Academy, was stepping down.

Members joined the Chair in thanking the above members for their contributions to the work of the Forum during their terms of office and wished them well in their future endeavours.

The Chair highlighted that the position of Vice Chair was now vacant and asked that this be added to the agenda for the next meeting.

Action: Clerk

2 APOLOGIES FOR ABSENCE

Apologies for absence were received and accepted on behalf of Sarah Vipond, Sarah Maltese, Claire Barnes, Ian Phillips, and Robin Archibald.

3 DECLARATIONS OF PECUNIARY INTEREST

No declarations of interest were declared related to agenda items to be discussed.

4 MINUTES OF THE PREVIOUS MEETING

The minutes of the meeting held on 30 March 2023, a copy of which had been circulated prior to the meeting, were confirmed and approved, subject to minor amendments.

5 MATTERS ARISING FROM THE MINUTES

6. Schools in Financial Difficulty

Sarah Sands confirmed that the Nursery and Primary Headteacher Forum had circulated a survey to schools, staff from the Barnet Education and Learning Service (BELS), local Councillors, and Members of Parliament (MPs) to gather data about the main financial pressures faced by schools. The aim of the information gathered was to work with unions to lobby the Government. The Forum would be updated in due course.

Action: Sarah Sands

9. SEND and AP Improvement Plan and Strategic Partnership Board

Karen Flanagan confirmed that she had received expressions of interest from members to join the SEND and AP Strategic Partnership Board and thanked those members who had volunteered.

Action: Members

There were no other matters arising.

6 DEDICATED SCHOOLS GRANT (DSG) OUTTURN 2022-23

The report updated the Forum on the 2022-23 DSG Outturn. Richard Cox outlined the following:

The total DSG allocation for 2022-23 after adjustments for academy recruitment and high needs places, was £250.692m.

At the end of the 2022-23 financial year, an underspend of £4.841m was carried forward to the DSG reserve. Along with the 2021-22 brought forward reserve, the total reserve balance for the DSG carried into 2023-24 was £9.711m.

In response to a question from Ian Kingham, Karen Flanagan confirmed that the earmarked reserves for high needs therapies were in addition to those already received via the NHS by special schools.

Responding to a query from Marc Lewis, Richard Cox confirmed that Barnet were one of few local authorities (LAs) which did not recharge 0.5% of the Schools Block to the High Needs Block because the LA was not producing a deficit in the High Needs Block, which was usually when this occurred. The Chair reminded members that this was a proposal in the past, but the Forum had voted against it and, although the DfE would have overturned this decision, by that point more money was injected into the High Needs Block.

Several schools received additional cash advances during the year totalling £0.625m to support cash flow. This would need to be repaid in 2023-24.

Responding to a question from Ben Hasan, Richard Cox and Sharon Palma stated that leniency, through suitable payment plans, would be shown to schools which may face financial jeopardy when repaying this.

The growth fund was the main driver of surplus within the Schools Block with an underspend of £2.361m.

The final outturn for the high needs block for 2022-23 was £60.795m, resulting in an underspend of £1.457m. However, it was noted that, had the additional uplift sum of £6.9m not been received, this would have been an overspend, as was the case the previous year.

7 SCHOOLS BALANCES 2022-23

The report, as outlined by Sharon Palma, updated the Forum on school balances for the 2022-23 financial year.

The report informed members about maintained schools' revenue balances for the financial year. The revenue balances for Barnet academies would be reported to the Schools Forum at the Autumn meeting, as their financial year ended 31 August.

It was noted that the data within the report was taken from quarter four returns and that balances were still unaudited.

The overall reported balance at end of year for maintained schools was £8,733,000. This compared to £11,431,200 the previous year, a decrease of £2,698,100 (24%).

Nursery revenue balances worsened to a total of £539,500 compared to £180,500 the previous year, an adverse movement of £359,000 (199%). Anecdotal evidence suggested that contributing factors included changing working patterns for parents resulting in less need for nursery places.

Maintained primary schools' balances totalled £3,893,800, a decrease of £2,312,000 (37%) compared to the previous year. Sharon Palma stated that one-form entries were particularly struggling as pay inflation outweighed the increased funding. However, most primary schools reported a balanced or surplus position.

Maintained secondary schools overall reported surplus balances totalling £3,581,200. This compared to £3,034,100 in 2021-22, an increase of £547,100 (18%). However, it was noted that this data was skewed positively by one school, which, if removed, would not show such an improved position. Neil Marlow added that bulge classes were still positively impacting the balances of secondary schools. Once these have moved through the secondary schools, it was anticipated that their balances would also be negatively impacted.

Special schools and PRUs, while maintaining surplus balances, reported year on year decreases in surplus balances of 28% and 16% respectively.

The data was reflective of the situation nationally and most schools, except for nurseries, had returned positive balances.

The Chair commented that the report reflected an improved position compared to that predicted at the previous meeting during quarter 3 and commended schools for tightening up on finances. Neil Marlow added that schools also tended to make worse-case year-of-end predictions in quarter 3 to ensure financial prudence.

Neil Marlow explained that school roll was a major contributory factor to budget pressures, although results of the survey commissioned by the Nursery and Primary Schools HT Forum suggested that schools with healthy rolls were still facing financial difficulties.

Sarah Sands stated that there are indications that schools can expect a big drop in rolls for the coming Reception year group and this needed to be carefully monitored. She reiterated that the West Hendon ward councillors requested information about the financial pressures faced by schools in their ward – particularly those resulting from expected drops in school roles. It was agreed that ward councillors should be invited to the Pupil Place Planning workshops related to their wards.

Action: Alison Dawes

Ben Hassan enquired as to what was driving falling rolls. Alison Dawes confirmed that, while there were minor factors such as changing working patterns, the main factor was a declining birth rate.

Sian commented that The Hyde, which was on the Barnet-Brent border did not experience any drop in school roll. Alison Dawes stated that the Pupil Place Planning workshops would be exploring why these factors affected some areas more than others.

8 PROPOSED USE OF DSG RESERVES

Neil Marlow gave a verbal update regarding the proposed use of DSG funding. The following was noted:

The Forum was reminded that £1m had been put aside last year for supporting asylum seekers. At the end of the last financial year, only £250k had been spent, meaning £750k was brought forward to the 2023-24 financial year. It was estimated that, by the end of the financial year, £500k of this money would have remained unspent.

Many of the asylum seekers had experienced significant trauma and had complex special needs. This was presenting difficulties related to school admissions and EHCP applications and there were currently no more available spaces within the specialist provision. The Forum had already agreed the flexible use of these remaining funds to help schools meet the needs and apply for EHCPs for these pupils.

In response to a query from Dan Hawkins, Neil Marlow confirmed that this funding would continue to be given to schools which took in these pupils after the October census. Members commended this initiative.

A further proposal was presented related to the Mayor of London's offer of Free School Meals (FSM) for Key Stage (KS) 2 pupils from September 2023. This presents additional administrative toil related to the collection of information from schools and invoicing. Secondly, as the FSM KS2 offer is based on take-up, schools may be disadvantaged financially, especially those schools which pay a higher price for their meals (for example, Kosher meals, which are significantly more expensive than the £2.65 offered).

While the plan was to propose the use of some DSG reserves to support schools which are negatively impacted by this, the LA has written to the Mayor of London to seek clarification.

Free School Meals Working Party

In response to a request from Neil Marlow, Matt Stevens and Harvey Freeman expressed an interest in joining a working party to review options when further information was received.

Action: FSM Working Party

9 HIGH NEEDS BLOCK AND SEND UPDATES

Karen Flanagan outlined the report, copies of which had been circulated prior to the meeting. The report updated Members on the High Needs Block financial position, the number of specialist places in Additional Resource Provisions (ARPs) and Special schools, the key headlines from the recently published SEND data, the SEND and AP Change Programme, and the High Needs Block Review.

In response to a question from the Chair regarding the deficit scenarios illustrated on page 16 of the report, Karen Flanagan confirmed that 5% was chosen as an illustration because it reflected inflation pressures. She reiterated that, if demand continued to increase, such a deficit position would materialise.

High Needs Block Review

The Chair introduced Peter Gray and Penny Richardson of Strategic Services for Children and Young People (SSCYP). He stated that they both had a vast amount of experience working locally and nationally with local authorities on reviewing high needs funding.

The Forum noted the presented findings from the High Needs Block Review. The presentation outlined the positives and challenges of the current system and proposed the following optional mainstream funding systems moving forward:

1. Traditional Approach: Statements/EHCPs
2. Banding
3. Predictable and Exceptional Needs

Sian Morris commented that it was difficult to switch to a new system without seeing it work in action as it was unknown how criteria would be applied and how funding would be deployed. Peter Gray responded that he would not recommend implementing a new system without giving due consideration through a task and finish group to consider the pros and cons of each. However, he emphasised that many LAs had not moved away from failing systems due to fears of risks associated with new systems.

Responding to a query from Dan Hawkins, Peter Gray stated that during pre-DSG times, the government delegated a significant amount of mainstream funding to schools for meeting predictable needs and used clusters at district level to moderate funding used to meet exceptional needs.

Ziz Chater and Sian Morris commented that, although the current system was not ideal and alternatives sounded good in theory, they felt hesitant moving to an entirely new system.

Members commented that there was a huge difference in SEND between schools and that, while there would be a board established to decide how to disseminate funding, schools would naturally prioritise their own school's needs. Peter Gray stated that SENCOs, rather than headteachers, could sit on the decision-making board to disseminate funding more fairly. He added that, in Barnet, where some schools were less experienced than others in dealing with SEND, this would be levelled out by the peer-to-peer moderation and challenge offered.

Ziz Chater expressed concerns about the amount of Headteacher or SENCO time this would consume, especially whilst transitioning to the new system. Peter Gray stated that, by running a system which was not fully dependent on EHCPs to access funding, the time consumed on processing those EHCPs would be saved.

Sian Morris raised the issue of children who would transfer between boroughs or out of London and asked whether this would require their application process to restart. Peter Gray stated that this had not been an issue with Croydon or Camden, which both had high levels of cross-borough transfers and that this depended on how well neighbouring boroughs worked together.

Peter Gray stated that he was under the impression that members had concerns about equality of the current model and that, if this was not the case, there would be no need to change it.

Karen Flanagan stated that Camden, the borough she formerly worked for, had success implementing the cluster model, with headteachers and SENCOs part of the panel responsible for disseminating funding. She said that the biggest benefit she saw with this system was the amount of peer moderation and support available. This brought about an improved understanding of the thresholds, which avoided making inappropriate applications and valuable saved time.

High Needs Review Task and Finish Group

Neil Marlow clarified that a new model would not remove the need for EHCPs, which would still be in place for those who needed specialist provision. He reminded members that current projections for the High Needs Block showed a future deficit position.

Karen Flanagan explained that the next step was to set up a task and finish working group to review options in more detail and make a recommendation to the Forum. The working group would be made up of Forum members, School Governors, Headteachers, SENCOs, and members of the Parent/Carer Forum. Sian Morris, Matt Stevens, Joanne Kelly, and Dan Hawkins nominated themselves or a representative to join.

Action: Karen Flanagan

10 SCHOOLS IN FINANCIAL DIFFICULTIES PANEL

Neil Marlow thanked the members who had joined the panel, which was due to start meeting next term and the Forum would be updated on proceedings.

Action: Schools in Financial Difficulties Panel

11 GROWTH FUNDING PROPOSAL FOR HASMONEAN HIGH SCHOOL FOR BOYS

The report outlined proposals from Hasmonian High School for Boys for pupil growth funding.

Neil Marlow reminded Members that only a small proportion of the Growth Funding had been used and informed them that Hasmonian High School for Boys had a waiting list of 54 boys who needing a place by September 2023. The school had no available space in their building to accommodate these and their parents wanted places at an Orthodox Jewish School. If unaccommodated, these parents were likely to opt for elective home education as nearly all independent Orthodox Jewish secondary schools in Barnet had Ofsted judgement of Inadequate or Requiring Improvement.

The LA managed to find an available building in Camden through the Westminster Diocese, which could be used by Hasmonian High School for Boys as a satellite provision for their Year 7 pupils. The school had viewed the building and were satisfied that it met their requirements. The school had since requested the growth funding and had undertaken fundraising to help finance the proposal. Ben Thomas stated that the amount raised by the school was £0.5m.

Neil Marlow emphasised that this was a temporary arrangement for two years as the school had obtained the synagogue next door to the Hasmonian Boys building and planned to convert it into an extension of their school building by then.

Keith Nason stated that, while the school was a multi-academy trust and set its own pay policy, he presumed workers would expect inner London pay if working in Camden. Neil Marlow stated that this was a Trust decision and confirmed that it had approved this following HR and Legal advice.

In response to a query from Ziz Chater, Neil Marlow confirmed that there was no space at the school to create a temporary classroom and that Hasmonian Girls

School was in a green-belt area meaning planning permission would have been rejected.

Responding to a question from Liz Longworth, Richard Cox confirmed that, with travel being over 1mile, the staff travel cost of £83k was part of the split-site funding formula previously agreed by the Forum.

The Forum **APPROVED** the use of growth funding to fund the proposed bulge classes for Hasmorean High School for Boys for 2023-24, the associated split site funding for the period 2023-24 to 2024-25, the associated staff travel costs for the period 2023-24 to 2024-25, and the total funding for the 2-year period (2023-24 and 2024-25) of up to £587,673 as set out in the report.

12 ANY OTHER BUSINESS

Date of Next Meeting

The Clerk confirmed that the next meeting was scheduled for 4pm on Thursday 19th October 2023.

There being no further business for discussion, the Chair brought the meeting to a close.

Meeting/Date	Schools Forum 19 October 2023	Agenda Item No.	5
Report Title	Scheme for Financing Schools		
Decision/ Discussion/ Update	Update		
Officer(s)	Sharon Palma Head of Finance - Children and Families' Services		
Appendices	None		
Summary	This report contains an update on the DfE Statutory Guidance for Scheme for Financing Schools (March 2023).		
Recommendations	That School Forum note: 1. Any changes and implications		

1. Background

- 1.1. This is issue 15 of statutory guidance given by the Secretary of State pursuant to s.48(4) and paragraph 2A(2) of Schedule 14 to the School Standards and Framework Act 1998, School Standards and Framework Act 1998.
- 1.2. Local authorities are required to publish schemes for financing schools, setting out the financial relationship between them and the schools they maintain. This guidance lists the provisions which a local authority's scheme must, should or may include. Schemes need not follow the format used in this guidance, except for the text of directed revisions.
- 1.3. In making any changes to their schemes, other than directed revisions, local authorities must consult all maintained schools in their area and receive the approval of the members of their schools forum representing maintained schools. Local authorities must take this guidance into account when they revise their schemes, in consultation with the schools forum.

<https://www.gov.uk/government/publications/schemes-for-financing-schools/schemes-for-financing-local-authority-maintained-schools>

2. Directed revisions

- 2.1. The Secretary of State may by a direction revise the whole or any part of the scheme as from such date as may be specified in the direction. In order to make a directed revision to schemes, the Secretary of State is required, by provisions in the School Standards and Framework Act 1998, to consult the relevant local authorities and other interested parties.
- 2.2. There are no directed revisions.

2.3. Other important changes to the guidance

Paragraph: 7.4 Income from the sale of assets

The scheme should contain a provision which allows schools to retain the proceeds of sale of assets, except in cases where the asset was purchased with non-delegated funds (in which case it should be for the local authority to decide whether the school should retain the proceeds), or the asset concerned is land or buildings forming part of the school premises and is owned by the authority. Any retention of funds from the sale of land assets is subject to the consent of the Secretary of State, and any conditions the Secretary of State may attach to that consent relating to use of proceeds.

The retention of proceeds of sale for premises not owned by the local authority will not be a matter for the scheme.

3. Implications

3.1. None to date.

Meeting/Date	Schools Forum 19 October 2023	Agenda Item No.	6
Report Title	2023-24 DSG Forecast Outturn (Month 6)		
Decision/ Discussion/ Update	Update		
Officer(s)	Sharon Palma Head of Finance – Children and Families’ Services		
Appendices	None		
Summary	This report updates Schools Forum on the 2023-24 DSG Forecast Outturn (at Month 6).		
Recommendations	For noting		

1. Summary

- 1.1. The total DSG allocation for the London Borough of Barnet for the financial year 2023-24 is £418.046m. After academy recoupment of £151.611m, the balance remaining is £266.435m of receipts into the Local Authority.
- 1.2. At month 6, forecast outturn expenditure for the financial year 2023-24 is £264.612m, a reported favourable variance of £1.823m in the Schools Block.
- 1.3. At the end of the 2023-24 financial year, the in-year forecast DSG surplus transferred to the DSG reserve is £1.823m.

Table 1: 2023-24 DSG Forecast Outturn at Month 6

	2022-23 Outturn	2023-24 Budget	2023-24 Forecast Outturn after reserves	2023-24 Variance after reserves
	£000	£000	£000	£000
Expenditure				
Schools Block:				
Individual Schools Budget	152,267	160,196	159,571	(625)
ESG Retained Funding	700	700	700	0
Growth fund	384	1,761	563	(1,198)
Central School Services Block	2,344	2,369	2,369	0
Sub-total	155,695	165,027	163,203	(1,823)

Early Years Block	29,181	32,519	32,519	0
High Needs Block	60,975	68,890	68,890	0
Sub-total	90,156	101,409	101,409	0
Grand Total	245,851	266,435	264,612	(1,823)
Income				
DSG Income	(250,692)	(266,435)	(266,435)	
DSG Balance	(4,841)	0	0	(1,823)

1.4. Earmarked reserves for 2023-24 include the available balance of £0.787m for Hong and Afghanistan refugees attending Barnet schools, after spend of £0.213m; and £1.000m for High Needs Therapies Programme and £1.539m Early Years contingent spend under grant conditions.

1.5. The DSG reserve balance brought forward from 2022-23 is £9.711m. After earmarked reserves and planned use of £3.326m; and an in-year surplus of £1.823m, the forecast reserve carried forward is £8.208m.

Table 2 : 2023-24 DSG Reserves Forecast

DSG reserves	B/Fwd	Use of Reserve	Top up Reserve	Net Use of Reserve	C/Fwd
	£m	£m		£m	£m
DSG Reserve	(9.711)	3.326	(1.823)	1.503	(8.208)
DSG Reserves	(9.711)	3.326	(1.823)	1.503	(8.208)

Use / Earmarked reserves	
Hong Kong and Afghanistan Refugees (Remaining support fund available from £1.0m commitment)	0.787
High Needs Therapies Programme	1.000
Early Years Contingent Grant Conditions	1.539
Planned Use/Earmarked	3.326

2. Schools Block

2.1. Individual School Budgets (ISB) are passported to schools based upon the funding formula. London Borough of Barnet matches the National Funding Formula.

2.2. During the 2022-23 year, a number of schools received additional cash advances totalling £0.625m to support cash flow. The advances are forecast

to be repaid in 2023-24, resulting in a reported favourable variance against Individual School Budgets.

2.3. The growth fund is reported to underspend by £1.198m against the budget of £1.761m.

3. Central Services Block

3.1. This block of the DSG is retained by the Local Authority to support central services for schools and to fund historic commitments.

3.2. At £2.369m, the Central Support Services Block is forecast to spend to budget.

4. Early Years (EY)

4.1. EY expenditure forecast at £32.519m is to budget. 95% of the funding is earmarked and passed through to schools and settings. The remaining 5% is retained by the Council for contingent spend in line with the conditions of grant.

5. High Needs Block

5.1. At month 6, HNB expenditure forecast is to budget.

Meeting/Date	Schools Forum 19 October 2023	Agenda Item No.	7
Report Title	National Funding Formula (NFF) 2024-25		
Decision/ Discussion/ Update	Update		
Appendices	Appendix 1 – 2024-25 Provisional NFF allocations		
Officer(s)	Sharon Palma Head of Finance – Children and Families’ Services		
Summary	<p>This report contains an overview of the Provisional National Funding Formula for 2024-25 DfE - October 2023</p> <p>National funding formula for schools and high needs 2024 to 2025 (publishing.service.gov.uk)</p> <p>National funding formula tables for schools and high needs: 2024 to 2025 - GOV.UK (www.gov.uk)</p>		
Recommendations	<p>That School Forum note:</p> <ol style="list-style-type: none"> 1. The provisional funding allocations and changes compared to 2023-24. 		

1. Background

1.1 The following report is based on the provisional national funding formulae for schools and high needs as published by the DfE in October 2023.

1.2 The total core schools budget will total over £59.6 billion in 2024-25. This total includes the Teachers’ Pay Additional Grant (TPAG) funding for teachers’ pay, an additional £482.5m in 2023-24 and £827.5 for 2024-25 for mainstream, special and alternative provision schools.

1.3 It should be noted that TPAG is allocated outside of the NFF in 2024-25 and is not included further in this report.

1.4 The mainstream schools additional grant (MSAG) introduced in 2023.24, is incorporated in the 2024-25 NFF.

- 1.5 Overall, funding through the mainstream schools NFF is increasing by 1.9% per pupil in 2024-25 compared to 2023-24.
- 1.6 Barnet is set to receive £411.6m in 2024-25 from the three blocks of the DSG that have been published (Schools, High Needs, and Central Schools Services) in October 2023. This is an increase of £27.8m or 7.2% compared to the current allocation of £383.8m for 2023-24.
- 1.7 The figures outlined do not however represent actual allocations – they are based on 2023-24 pupil numbers. Final 2024-25 funding for the Schools, High Needs, and Central School Services Blocks will be calculated in December – based on the latest pupil data available.
- 1.8 Last year 2023-24, was the first year of the transition to the ‘direct’ schools NFF, whereby all mainstream schools across England are funded through the same national formula without allowing for adjustment through local funding formulae. Local authorities are only allowed to use NFF factors in their local formula and, excluding the locally determined premises factors, must use all NFF factors.
- 1.9 Barnet continues to match the NFF and there is no distributional impact from the requirement to transition to ‘direct’ schools NFF.

2. Schools Block Funding

- 2.1 The basic structure of the schools NFF is not changing in 2024-25.
- 2.2 The minimum per pupil values in 2024-25 will be set at £4,610 per pupil for primary schools and £5,995 per pupil for secondary schools. This includes £143, £186, and £208 per primary, KS3, and KS4 pupil respectively.
- 2.3 The Mainstream Schools Additional Grant (MSAG) introduced in 2023-24 is being rolled into the schools NFF from 2024-25, effectively adding £119, £168 and £190 to the primary, Key Stage 3 and Key Stage 4 per pupil funding factors respectively; £104 and £152 to the primary and secondary FSM6 factors; and £4,510 to the school lump sum.

2.4 Furthermore, adding to the minimum per pupil (MPP) funding levels for primary, KS3 and KS4; £143, £186 and £208 respectively. This increases the amount that schools funded through the minimum per pupil funding levels attract through the NFF. The amounts reflect the average amount of funding these schools currently attract through the grant.

2.5 The local authority funding formulae will continue to include a minimum funding guarantee (MFG) which in 2024-25 must be set between +0.0% and +0.5%. In previous years Barnet has set the maximum allowed and is expected to continue to do so for 2024-25.

2.6 Further support is directed towards the disadvantaged by increasing the additional needs factor values. This is illustrated in Table 1 below.

Table 1: Changes to Funding Factor Values

Details	Uplift
Free School Meals (FSM)	1.6%
Basic Entitlement; Free School Meals (ever 6) FSM6; Lower Prior Attainment (LPA); English as an Additional Language (EAL); Mobility; School Lump Sum; Sparsity; Minimum per pupil levels (MPPL); IDACI	1.4%

2.7 To demonstrate the impact on schools, in October 2023 the DfE published the notional school's NFF funding for 2024-25 (subject to updated pupil numbers). This is shown in Appendix I.

3 High Needs Funding

3.1 High-needs funding supports provision for children and young people with special educational needs and disabilities (SEND) from ages 0-25 years. It also supports alternative provision (AP) for pupils of compulsory school age who, because they have been excluded or suspended, or because of illness or other reasons, cannot receive their education in mainstream or special schools.

- 3.2 The basic entitlement of £4,660 per pupil remains unchanged compared to 2023.-24. Barnet's basic entitlement per pupil after an Area Cost Adjusted (ACA) – weighted factor is £5,194.

Table 2: Indicative Local Authority DSG Funding

NFF Allocations	2023-24* (Latest) £m	2024-25* (Indicative) £m	Change Inc/(dec) £m
Schools Block**	312.506	331.488	18.982
High Needs	68.890	77.629	8.739
Central School Services Block	2.369	2.487	0.118

*Before recoupment

**Excluding growth fund

Appendix 1: 2024-25 Provisional NFF allocations (1 of 4)

School Name	Phase	2022-23 pupil count	Baseline funding (2023-24) (total cash)	2023-24 pupil count	Notional NFF funding in 2024-25 (total cash)	Notional NFF funding in 2024-25 (full-year equivalent) (£ per pupil)	Percentage change in total NFF funding compared to baseline (total)	Percentage change in pupil-led NFF funding (per pupil)
Akiva School	Primary	421	£1,927,189	421	£1,955,412	£4,645	1.46%	1.46%
All Saints' CofE Primary School N20	Primary	211	£1,126,183	211	£1,167,183	£5,532	3.64%	4.13%
All Saints' CofE Primary School NW2	Primary	160	£1,030,212	162	£1,091,861	£6,740	5.98%	5.62%
Alma Primary	Primary	207	£1,015,253	200	£1,005,714	£5,029	-0.94%	2.36%
Ark Pioneer Academy	Secondary	712	£5,051,378	897	£6,536,997	£7,288	29.41%	3.42%
Ashmole Academy	Secondary	1,304	£8,388,780	1,304	£8,478,740	£6,502	1.07%	1.09%
Ashmole Primary School	Primary	420	£2,070,164	422	£2,088,975	£4,950	0.91%	0.50%
Barnfield Primary School	Primary	419	£2,422,527	419	£2,439,799	£5,823	0.71%	0.50%
Beis Yaakov Primary School	Primary	420	£1,946,405	414	£1,943,014	£4,693	-0.17%	0.93%
Beit Shvidler Primary School	Primary	196	£1,014,961	205	£1,071,549	£5,227	5.58%	1.73%
Bell Lane Primary School	Primary	359	£2,065,181	346	£2,058,272	£5,949	-0.33%	3.14%
Bishop Douglass School Finchley	Secondary	639	£5,134,344	734	£5,904,316	£8,044	15.00%	0.50%
Blessed Dominic Catholic Primary School	Primary	416	£2,293,714	411	£2,279,390	£5,546	-0.62%	0.50%
Broadfields Primary School	Primary	651	£3,412,354	643	£3,520,671	£5,475	3.17%	4.60%
Brookland Infant and Nursery School	Primary	270	£1,464,233	270	£1,563,243	£5,790	6.76%	7.33%
Brookland Junior School	Primary	358	£1,811,933	359	£1,846,618	£5,144	1.91%	1.58%
Brunswick Park Primary and Nursery School	Primary	421	£2,265,541	423	£2,293,830	£5,423	1.25%	0.50%
Chalgrove Primary School	Primary	227	£1,285,440	219	£1,276,779	£5,830	-0.67%	2.29%
Childs Hill Primary School	Primary	406	£2,320,042	418	£2,398,809	£5,739	3.40%	0.65%
Christ Church Primary School	Primary	210	£1,069,836	210	£1,095,504	£5,217	2.40%	2.70%
Christ's College Finchley	Secondary	769	£5,542,896	822	£5,967,881	£7,260	7.67%	0.92%
Church Hill School	Primary	208	£1,118,527	211	£1,165,601	£5,524	4.21%	3.03%
Claremont Primary School	Primary	296	£1,816,058	302	£1,858,381	£6,154	2.33%	0.50%
Colindale Primary School	Primary	627	£3,468,305	626	£3,514,683	£5,615	1.34%	0.91%
Coppetts Wood Primary School	Primary	210	£1,306,444	221	£1,378,249	£6,236	5.50%	0.50%
Copthall School	Secondary	700	£5,244,564	770	£5,873,287	£7,628	11.99%	2.12%
Courtland School	Primary	210	£1,111,051	210	£1,123,848	£5,352	1.15%	0.92%
Cromer Road Primary School	Primary	415	£2,155,136	415	£2,172,745	£5,236	0.82%	0.50%
Danegrove Primary School	Primary	616	£3,225,512	626	£3,430,052	£5,479	6.34%	4.73%
Deansbrook Infant School	Primary	217	£1,279,745	209	£1,294,906	£6,196	1.18%	4.91%
Deansbrook Junior School	Primary	323	£1,767,705	298	£1,649,806	£5,536	-6.67%	0.50%
Dollis Primary School	Primary	415	£2,359,916	397	£2,311,506	£5,822	-2.05%	1.62%
East Barnet School	Secondary	1,130	£7,613,587	1,119	£7,621,005	£6,811	0.10%	1.08%
Edgware Primary School	Primary	459	£2,577,356	425	£2,456,257	£5,779	-4.70%	2.35%
Etz Chaim Jewish Primary School	Primary	164	£833,931	159	£829,555	£5,217	-0.52%	2.49%

Appendix 1: 2024-25 Provisional NFF allocations (2 of 4)

School Name	Phase	2022-23 pupil count	Baseline funding (2023-24) (total cash)	2023-24 pupil count	Notional NFF funding in 2024-25 (total cash)	Notional NFF funding in 2024-25 (full-year equivalent) (£ per pupil)	Percentage change in total NFF funding compared to baseline (total)	Percentage change in pupil-led NFF funding (per pupil)
Fairway Primary School and Children's Centre	Primary	203	£1,220,920	202	£1,262,346	£6,249	3.39%	3.57%
Finchley Catholic High School	Secondary	889	£5,861,915	895	£6,035,466	£6,744	2.96%	2.27%
Foulds School	Primary	317	£1,529,793	321	£1,592,153	£4,960	4.08%	2.82%
Friern Barnet School	Secondary	721	£5,603,885	740	£5,880,918	£7,947	4.94%	2.22%
Frith Manor Primary School	Primary	454	£2,341,203	453	£2,401,565	£5,301	2.58%	2.63%
Garden Suburb Infant School	Primary	222	£1,283,603	239	£1,447,002	£6,054	12.73%	6.16%
Garden Suburb Junior School	Primary	337	£1,757,821	336	£1,810,177	£5,387	2.98%	3.35%
Goldbeaters Primary School	Primary	412	£2,432,590	418	£2,482,051	£5,938	2.03%	0.50%
Hasmonean High School for Boys	Secondary	513	£3,371,023	537	£3,538,682	£6,590	4.97%	0.50%
Hasmonean High School for Girls	Secondary	442	£2,883,651	426	£2,826,539	£6,635	-1.98%	1.59%
Hasmonean Primary School	Primary	198	£1,050,711	199	£1,074,671	£5,400	2.28%	1.81%
Hendon School	Secondary	1,020	£7,748,092	1,048	£8,096,480	£7,726	4.50%	1.79%
Hollickwood Primary School	Primary	185	£1,165,647	187	£1,196,602	£6,399	2.66%	1.61%
Holly Park Primary School	Primary	416	£2,117,870	422	£2,225,172	£5,273	5.07%	3.75%
Holy Trinity CofE Primary School	Primary	193	£1,065,957	199	£1,134,041	£5,699	6.39%	4.13%
Independent Jewish Day School	Primary	197	£960,244	201	£990,715	£4,929	3.17%	1.69%
JCoSS	Secondary	991	£7,172,427	993	£7,232,132	£7,283	0.83%	0.50%
Livingstone Primary and Nursery School	Primary	211	£1,350,574	215	£1,383,635	£6,436	2.45%	0.50%
London Academy	All-through	1,373	£9,831,326	1,379	£9,922,271	£7,195	0.93%	0.50%
Manorside Primary School	Primary	238	£1,314,131	205	£1,171,926	£5,717	-10.82%	1.03%
Martin Primary School	Primary	621	£3,200,528	619	£3,323,289	£5,369	3.84%	4.05%
Mathilda Marks-Kennedy Jewish Primary School	Primary	205	£1,015,347	206	£1,026,625	£4,984	1.11%	0.50%
Menorah Foundation School	Primary	359	£1,695,498	343	£1,664,123	£4,852	-1.85%	2.06%
Menorah High School for Girls	Secondary	299	£1,959,590	311	£2,078,161	£6,682	6.05%	2.38%
Menorah Primary School	Primary	379	£1,761,006	378	£1,774,268	£4,694	0.75%	1.03%
Mill Hill County High School	Secondary	1,243	£8,181,850	1,247	£8,306,908	£6,662	1.53%	1.23%
Millbrook Park Primary School	Primary	384	£1,998,398	392	£2,093,454	£5,340	4.76%	2.99%
Monken Hadley CofE Primary School	Primary	150	£817,132	148	£811,841	£5,485	-0.65%	0.50%
Monkfrith Primary School	Primary	423	£2,015,776	420	£2,039,985	£4,857	1.20%	1.71%
Moss Hall Infant School	Primary	356	£1,868,983	355	£1,945,700	£5,481	4.10%	4.61%
Moss Hall Junior School	Primary	445	£2,197,391	434	£2,209,759	£5,092	0.56%	3.00%
Northside Primary School	Primary	210	£1,239,375	210	£1,250,773	£5,956	0.92%	0.50%
Osidge Primary School	Primary	414	£2,203,738	404	£2,188,889	£5,418	-0.67%	1.66%
Our Lady of Lourdes RC School	Primary	206	£1,098,522	208	£1,126,761	£5,417	2.57%	1.91%
Pardes House Primary School	Primary	355	£1,692,846	356	£1,716,553	£4,822	1.40%	1.02%

Appendix 1: 2024-25 Provisional NFF allocations (3 of 4)

School Name	Phase	2022-23 pupil count	Baseline funding (2023-24) (total cash)	2023-24 pupil count	Notional NFF funding in 2024-25 (total cash)	Notional NFF funding in 2024-25 (full-year equivalent) (£ per pupil)	Percentage change in total NFF funding compared to baseline (total)	Percentage change in pupil-led NFF funding (per pupil)
Parkfield Primary School	Primary	379	£2,127,819	377	£2,201,261	£5,839	3.45%	4.26%
Queen Elizabeth's Girls' School	Secondary	960	£6,528,155	1,007	£6,914,303	£6,866	5.92%	1.10%
Queen Elizabeth's School, Barnet	Secondary	957	£5,863,993	959	£5,928,381	£6,182	1.10%	0.92%
Queenswell Infant & Nursery School	Primary	171	£1,041,921	166	£1,121,323	£6,755	7.62%	11.75%
Queenswell Junior School	Primary	290	£1,621,651	270	£1,557,277	£5,768	-3.97%	2.44%
Rimon Jewish Primary School	Primary	194	£1,008,875	198	£1,031,020	£5,207	2.20%	0.50%
Rosh Pinah Primary School	Primary	355	£1,653,308	342	£1,626,900	£4,757	-1.60%	1.78%
Sacks Morasha Jewish Primary School	Primary	210	£1,008,195	207	£1,016,779	£4,912	0.85%	2.46%
Sacred Heart Roman Catholic Primary School	Primary	389	£1,862,213	409	£2,004,741	£4,902	7.65%	2.99%
Saracens High School	Secondary	845	£6,431,053	870	£6,764,292	£7,775	5.18%	2.28%
Shalom Noam Primary School	Primary	204	£1,093,346	209	£1,122,130	£5,369	2.63%	0.50%
St Agnes' Catholic Primary School	Primary	385	£2,114,335	402	£2,250,522	£5,598	6.44%	2.36%
St Andrew the Apostle Greek Orthodox School	Secondary	615	£4,319,410	585	£4,195,956	£7,173	-2.86%	2.02%
St Andrew's CofE Voluntary Aided Primary School, Totteridge	Primary	207	£1,053,593	208	£1,083,066	£5,207	2.80%	2.69%
St Catherine's RC School	Primary	418	£2,051,127	421	£2,083,145	£4,948	1.56%	0.89%
St James' Catholic High School	Secondary	1,095	£7,798,964	1,075	£7,796,148	£7,252	-0.04%	1.70%
St John's CofE Junior Mixed and Infant School	Primary	210	£1,082,231	210	£1,119,298	£5,330	3.43%	3.90%
St John's CofE Primary and Nursery School	Primary	210	£1,076,949	210	£1,109,167	£5,282	2.99%	3.38%
St Joseph's Catholic Primary School	Primary	441	£2,313,146	453	£2,401,666	£5,302	3.83%	1.24%
St Mary's CofE Primary School	Primary	411	£2,057,072	409	£2,118,485	£5,180	2.99%	3.50%
St Mary's CofE Primary School, East Barnet	Primary	213	£1,086,891	216	£1,130,526	£5,234	4.01%	3.14%
St Mary's and St John's CofE School	All-through	1,455	£9,330,089	1,485	£9,693,618	£6,528	3.90%	1.60%
St Michael's Catholic Grammar School	Secondary	591	£3,914,870	606	£4,034,810	£6,658	3.06%	0.50%
St Paul's CofE Primary School N11	Primary	200	£1,163,546	191	£1,145,160	£5,996	-1.58%	2.74%
St Paul's CofE Primary School NW7	Primary	209	£1,096,194	209	£1,120,861	£5,363	2.25%	2.54%
St Theresa's Catholic Primary School	Primary	171	£938,994	175	£1,016,730	£5,810	8.28%	7.27%
St Vincent's Catholic Primary School	Primary	286	£1,441,157	281	£1,433,830	£5,103	-0.51%	1.15%

Appendix 1: 2024-25 Provisional NFF allocations (4 of 4)

School Name	Phase	2022-23 pupil count	Baseline funding (2023-24) (total cash)	2023-24 pupil count	Notional NFF funding in 2024-25 (total cash)	Notional NFF funding in 2024-25 (full-year equivalent) (£ per pupil)	Percentage change in total NFF funding compared to baseline (total)	Percentage change in pupil-led NFF funding (per pupil)
Summerside Primary Academy	Primary	386	£2,144,956	408	£2,314,189	£5,672	7.89%	2.63%
Sunnyfields Primary School	Primary	207	£1,230,614	208	£1,280,475	£6,156	4.05%	3.74%
The Annunciation Catholic Infant School	Primary	128	£768,237	144	£912,805	£6,339	18.82%	9.62%
The Annunciation RC Junior School	Primary	182	£1,027,226	181	£1,051,530	£5,810	2.37%	3.24%
The Archer Academy	Secondary	815	£5,525,329	818	£5,583,633	£6,826	1.06%	0.50%
The Compton School	Secondary	1,043	£7,282,460	1,045	£7,400,155	£7,081	1.62%	1.46%
The Henrietta Barnett School	Secondary	518	£3,269,326	520	£3,297,045	£6,340	0.85%	0.50%
The Hyde School	Primary	419	£2,319,686	412	£2,294,080	£5,568	-1.10%	0.50%
The Orion Primary School	Primary	839	£5,257,307	839	£5,285,438	£6,300	0.54%	0.50%
The Totteridge Academy	Secondary	751	£5,928,779	829	£6,561,096	£7,914	10.67%	0.50%
Trent CofE Primary School	Primary	211	£1,099,043	209	£1,095,765	£5,243	-0.30%	0.52%
Tudor Primary School	Primary	214	£1,303,378	222	£1,356,824	£6,112	4.10%	0.50%
Underhill School	Primary	483	£2,783,801	504	£2,959,856	£5,873	6.32%	1.97%
Watling Park School	Primary	364	£2,179,536	380	£2,302,627	£6,060	5.65%	1.59%
Wessex Gardens Primary School	Primary	327	£1,868,697	322	£1,937,146	£6,016	3.66%	5.29%
Whitefield School	Secondary	612	£5,209,785	598	£5,118,721	£8,560	-1.75%	0.50%
Whitings Hill Primary School	Primary	421	£2,610,575	422	£2,646,699	£6,272	1.38%	0.50%
Woodcroft Primary School	Primary	382	£2,248,835	385	£2,319,773	£6,025	3.15%	2.30%
Woodridge Primary School	Primary	205	£1,066,230	204	£1,085,560	£5,321	1.81%	2.22%
Wren Academy Finchley	All-through	1,331	£8,035,638	1,334	£8,092,944	£6,067	0.71%	0.50%

Meeting/Date	Schools Forum 19 October 2023	Agenda Item No.	7.1
Report Title	2024-25 Central Schools Services Block (CSSB)		
Decision/ Discussion/ Update	Update / Decision		
Officer(s)	Sharon Palma – Head of Finance – Children and Families’ Services		
Appendices	None		
Summary	This report contains an update of the 2024-25 Central Schools Services Block (CSSB)		
Recommendations	That School Forum note: 1. 2024-25 Estimated figures for CSSB 2. To agree ongoing responsibility		

1. Recommendation

1.1 For members of the forum to agree to the ongoing responsibility and to note the 2024-25 estimated figures and that final figures will be presented to the forum in January 2024.

2. Summary

2.1 The indicative CSSB for 2024-25 has increased by £0.120m to £2.487m. As in previous years, the increase has been pro-rated as per the current year’s budget as shown in Table 1 below.

3. Central Schools Services Block (CSSB)

3.1 The Central Schools Services Block (CSSB) is formulated to cover both historic commitments and ongoing responsibilities. The former are fixed amounts committed in 2012-13 and cannot be increased under the National Funding Formula. The Department for Education (DfE) expects that historical commitments will reduce over time and therefore have reduced allocations by 20% for 2024-25.

3.2 Ongoing responsibilities include funding for duties for all pupils within the Local Authority (LA) boundary, admissions and appeals, Schools Forum administration, and copyright licensing.

3.3 Schools Forum is required to approve Central Services Block amounts, except for Copyright Licensing, which is negotiated on behalf of all LAs by the DfE. The DfE has published

indicative allocations in October 2023 and final amounts for this block will be confirmed in December 2023. Schools Forum will be updated in January 2024 on final allocations for its approval.

3.4 The indicative CSSB for 2024-25 is £2.487m comprising a historical commitment of £0.152m (2023-24 £0.190m allocation reduced by 20%) and ongoing responsibilities of £2.335m listed in Table 1. The increase of £0.120m has been pro-rated as per the 2023-24 allocation.

3.5 The final figure for ongoing responsibilities will be based on the October 2023 census.

Table 1: Breakdown of Historic and Ongoing Responsibilities for CSSB – 2024-25

		2024-25 Indicative	2023-24
		£m	£m
Historic Commitments	Safer Families	0.060	0.075
	CAF Team	0.092	0.115
Sub-total		0.152	0.190
Ongoing Responsibilities	School Admissions	0.455	0.425
	Servicing of Schools Forum	0.039	0.036
	Copyright Licensing Costs	0.359	0.335
	Education Welfare Service	0.528	0.493
	Asset Management	0.046	0.043
	Statutory/Regulatory Duties	0.908	0.847
Sub-total		2.335	2.179
TOTAL		2.487	2.369

Meeting/Date	Schools Forum 19 October 2023	Agenda Item No.	8.1
Report Title	2024-25 De-Delegation		
Decision/ Discussion/ Update	Decision		
Officer(s)	Sharon Palma – Head of Finance – Children and Families’ Services Jacob Davies – Finance Manager (DSG)		
Appendices	None		
Summary	This report contains an update of 2024-25 De-Delegation		
Recommendations	That School Forum to approve: 1. the de-delegation rates for FY 2024-25		

1. Recommendation

1.1. For the members of the forum to approve the de-delegation rates for FY 2024-25.

2. Summary

2.1. The de-delegation rates proposed for FY2024-25 are the same as FY2023-24.

3. Background

3.1. The Local Authority (LA) is required to consult the primary and secondary maintained school representatives on the Schools Forum every year about the de-delegation of many centrally-held budgets. De-delegated funds are a deduction from maintained schools’ budget shares, after the calculation of Schools Block allocations. De-delegation can only apply to maintained primary and secondary school budgets. Academies, free schools, special schools, PRUs and nurseries cannot de-delegate. However, they can choose to buy into the same de-delegated services on a traded arrangement, at an agreed per-pupil rate or in the case of special schools and PRUs by a per-place amount.

3.2. Decisions on De-delegation must be taken at the Schools Forum by primary and secondary sector representatives separately, every financial year. It requires the agreement of a simple majority of the maintained representatives for the relevant phase on the Schools Forum on a recommended per-pupil basis.

- 3.3. De-delegated budgets can change within the financial year, decreasing when schools convert to academies but rising if maintained schools expand, or independent schools join the maintained sector.
- 3.4. For the 2024-25 financial year, the LA is requesting the same de-delegation items as approved in January 2023 for 2023-24, with indicative rates matching those of last year.
1. Behaviour Support Services (currently de-delegated by primaries but not secondary schools)
 2. Support to UPEG (underperforming ethnic groups) and bilingual learners (“Narrowing the Gap”)
 3. Staff costs – supply cover for (trade union) facility time
 4. Schools Contingency
 5. Additional School Improvement Services

4. De-delegation items

- 4.1. The **Behaviour Support** budget funds part of the work of the Inclusion Advisory Team’s (previously called the high incidence support team or HIST) work with maintained primary schools. BELS employs 1.2 FTE Advisory Teachers for SEMH funded from de delegation who support all maintained schools. The de-delegation rate is proposed to remain unchanged at **£3.22 per pupil** for maintained primary schools.
- 4.2. Work on **narrowing the gap (NtG)** with maintained schools funded by the de-delegation from maintained primary and secondary schools. When the NtG Lead retired his work was absorbed by the School Improvement and Data Teams. BELS uses the NtG de delegated funding to support the staffing costs of the School Improvement and Data Teams, going towards the time the teams spend on NtG (or Diminishing the Differences). The de-delegation rates are proposed to remain unchanged at **£12.33 (Primary) and £10.96 (Secondary) per pupil**, based on FSM Ever 6 pupil numbers.
- 4.3. Staff costs for **trade union duties** fund the salaries of officials of the various unions representing staff in maintained schools. The budget is supplemented by income from a traded service that enables academies to contribute to these costs. The de-delegation rates are proposed to remain unchanged at **£1.66 (Primary) and £1.44(Secondary) per pupil**.
- 4.4. The centrally held **School contingency** is for unforeseen circumstances when the school’s budget share was initially determined; an example of the use of contingencies would be the funding of additional **NNDR (business rate) costs** following a re-valuation. Financial support for schools making redundancies in order to recover a deficit is also funded from here. Schools continue to face financial challenges and are likely to depend on the support of the contingency pot. The contingency is held at £0.460m it is therefore proposed the de-delegation rates for 2023-24 remain at **£15.89 (Primary) and £14.63 (Secondary) per pupil**.

- 4.5. **Additional School Improvement Services** covers the historic additional improvement de-delegation, used to support the Learning Network Inspector Team to carry out core statutory functions, and in addition replace the Schools Improvement Monitoring and Brokering Grant (SIMB), which was reduced in 22-23 and removed in 23-24. This will enable school improvement services and rates will be held as per agreement in January 2023 for 23-24, which is **£18.57 (Primary) and £6.61 (Secondary) per pupil**.

The de-delegation of the following items for 2024-25.

De-delegation	£ per pupil*	Estimated Total*	Primary	Secondary
Behaviour Support	£3.22	£76,977	yes/no/abstain	
Narrowing the Gap**	£12.33 (primary) £10.96 (secondary)	£77,667	yes/no/abstain	yes/no/abstain
Trade Union Duties	£1.66 (primary) £1.44 (secondary)	£47,614	yes/no/abstain	yes/no/abstain
School Contingency	£15.89 (primary) £14.63 (secondary)	£460,433	yes/no/abstain	yes/no/abstain
Additional School Improvement services	£18.57 (primary) £6.61 (secondary)	£480,335	yes/no/abstain	yes/no/abstain

* Based on 2023-24 Age Weighted Pupil Unit (AWPU) pupils i.e., 23,906 primary and 5,507 secondary, except for;

** Based on the FSM6 numbers 5,267 primary and 1161 secondary

Primary and secondary representatives of maintained mainstream schools are required to vote separately on each budget.

Confirmed budgets will be updated in January 2024 Schools Forum, based on October 2023 census data.

Meeting/Date	Schools Forum 19 October 2023	Agenda Item No.	8.2
Report Title	2024-25 Former ESG Services		
Decision/ Discussion/ Update	Decision		
Officer(s)	Sharon Palma – Head of Finance – Children and Families’ Services Jacob Davies – Finance Manager (DSG)		
Appendices	None		
Summary	This report contains proposal to continue to fund services, previously funded from the ESG, from maintained school shares		
Recommendations	That School Forum approve: 1. £0.700m to maintain level of services previously funded by ESG		

1. Recommendation

- 1.1 Members of the Schools Forum are requested to approve the proposal for 2024-25 to charge the cost of services formerly funded from the ESG to the budgets of maintained schools, maintaining the level of £700,000.

2. Summary

- 2.1 The services and the total amount to be funded under this proposal are set out in the table in section 2.7 below. In summary, these are:
- Statutory and regulatory duties
 - Asset management
 - Monitoring national curriculum assessments

3. Background

- 3.1 The ESG proposal is a consequence of the removal of Education Services Grant from the council. The council lost £2.8m of funding of statutory services to maintained schools, of which £300,000 related to school improvement services.
- 3.2 The Education Services Grant was additional funding given to academies and local authorities until 2016-17 for services such as school improvement, education welfare services, asset management and strategic planning.

- 3.3 The DfE has allocated funding towards school improvement functions through a special school improvement grant for the last three years.
- 3.4 The General Fund element of the ESG (£2.8m for Barnet in 2016-17) related to local authority statutory duties in respect of services to maintained schools only (community and voluntary-aided schools, not Academies or Free Schools).
- 3.5 Government guidance made clear that councils may request retention of a share of maintained school budgets to cover the loss of ESG income. The council has made similar request in each of the last three years.
- 3.6 The proposal will mean that the council can continue to provide the statutory services to maintained schools without having to make further cuts to other front-line services that have already faced significant budget reductions. The council needs to charge the proposed total amount to Maintained school budgets to maintain a central education function. The council cannot legally stop providing these services. They all relate to statutory duties.
- 3.7 The following table sets out the LA responsibilities for maintained schools only and the estimated expenditure in 2023-24 and 2024-25:

Statutory and regulatory duties - S.251 category	£ in 2024-25	£ in 2023-24
1.6.4		
Budgeting and accounting functions relating to maintained schools (Sch 2, 74)		
Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Sch 2, 59)		
Internal audit and other tasks related to the authority's chief finance officer's responsibilities under Section 151 of LGA 1972 for maintained schools (Sch 2, 60)		
Functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Sch 2, 61)		
Functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Sch 2, 73)		
Retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Sch 2, 76)		
HR duties, including: advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Sch		

2, 64); determination of conditions of service for non-teaching staff (Sch 2, 65); appointment or dismissal of employee functions (Sch 2, 66) Consultation costs relating to staffing (Sch 2, 67) Compliance with duties under Health and Safety at Work Act (Sch 2, 68) Provision of information to or at the request of the Crown relating to schools (Sch 2, 69) Functions under the Equality Act 2010 (Sch 2, 71) Establish and maintaining computer systems, including data storage (Sch 2, 72) Appointment of governors (Sch 2, 73)		
Total expenditure on statutory and regulatory duties	£550,000	£550,000
Asset management - S.251 category 1.6.3	£ in 2024-25	£ in 2023-24
General landlord duties for all maintained schools (Sch 2, 77a & b (section 542(2)) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have: <ul style="list-style-type: none"> • appropriate facilities for pupils and staff (including medical and accommodation) • the ability to sustain appropriate loads • reasonable weather resistance • safe escape routes • appropriate acoustic levels • lighting, heating and ventilation which meets the required standards • adequate water supplies and drainage • playing fields of the appropriate standards General health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974) Management of the risk from asbestos in community school buildings (Control of Asbestos Regulations 2012)		
Total expenditure on asset management	£125,000	£125,000
Monitoring national curriculum assessment - S.251 category 1.6.6	£ in 2024-25	£ in 2023-24
Monitoring of National Curriculum assessments (Sch 2, 75)	£25,000	£25,000
TOTAL	£700,000	£700,000

4. Impact on individual school budgets

- 4.1 The proposal, if approved, would mean a deduction from the budgets of maintained primary and secondary schools of approximately £23.80 per pupil based on October 22 pupil numbers. The per pupil deduction rate will be finalised once pupil census numbers for 2023-24 are known. This will come to January 2024 Schools forum.

Meeting/Date	Schools Forum 19 October 2023	Agenda Item No.	9
Report Title	2024-25 Split-sites, Growth Fund, and Falling rolls Criteria		
Decision/ Discussion/ Update	Update		
Officer(s)	Sharon Palma – Head of Finance – Children and Families’ Services Jacob Davies – Finance Manager (DSG)		
Appendices	None		
Summary	This report contains an update of 2024-25 Split-sites, Growth Fund, and Falling rolls Criteria		
Recommendations	That School Forum: (1) Note the new changes to split site funding from 2024-25 (2) Note the changed to the Growth Fund criteria for 2024-25 (3) Note the 2024-25 new methodology for calculating and allocation of Falling rolls		

1. Split Sites

In 2024 to 2025 the DfE are introducing a national formulaic approach to split sites funding, which replaces the previous local authority-led approach. The new split sites factor is compulsory for all local authorities, ensuring that split sites funding will be allocated consistently and fairly across the country. Local authorities are required to set their split sites factor values within the 2.5% mirroring threshold for the NFF.

The factor is made up of 2 parts, both of which are compulsory:

- basic eligibility funding: schools must be allocated a lump sum payment for each of their additional eligible sites.
- distance funding: additional funding must be paid out on top of the basic eligibility lump sum for schools whose eligible sites are separated by more than 100 metres (by road distance) from the main site.

The basic eligibility criteria for split sites funding requires additional sites to:

- be part of the main school, that is, to share the same unique reference number (URN) with the school's main site.
- be separated from the school's main site by a public road or railway.
- have a building on them which is maintained by the school and which is primarily used for the education of 5 to 16- year-old pupils in mainstream education. This excludes playing fields, 'ancillary buildings' and buildings leased out full time by the school to another entity

Funding for the distance element should be allocated through a tapered approach, beginning at 100 metres, with allocations increasing linearly up to 500 metres, from which point schools should receive the total maximum funding available.

The NFF lump sum for basic eligibility is £53,700 and the NFF maximum distance funding is £26,900. Local authorities are required to uplift these values with their respective ACAs in their local formulae and set their local factor values within the 2.5% mirroring threshold of the ACA uplifted lump sum value.

The number of additional sites that schools can receive funding for should be capped at 3 per school. If a school has more than 3 additional sites, the distance funding should be calculated based on those that are furthest away from the main site.

Split sites funding is by default included in the baseline calculation within the APT. As such, any loss in funding for schools which have previously benefited from their local split site factor is automatically protected through the MFG. If a school reorganisation means that a school stop being a split site school, local authorities maintain the right to amend the MFG calculation to prevent the split sites funding from being protected.

2. Growth Fund

Growth funding is provided within local authorities' schools block DSG allocations. For 2024 to 2025, it will be calculated using the same methodology as previous year, based on the growth in pupil numbers between the October 2022 and October 2023 censuses. Growth allocations will be communicated to each local authority within their DSG settlement.

There will not be any growth funding protection in 2024 to 2025 - following the same approach as for 2023 to 2024. As it is within the schools block, a movement of funding from the schools formula into the growth fund would not be treated as a transfer between blocks.

The growth fund can only be used to:

- support growth in pre-16 pupil numbers to meet basic need.
- support additional classes needed to meet the infant class size regulation.

- meet the costs of new schools (these are new schools identified from the latest census data)

The growth fund must not be used to support:

- schools in financial difficulty: any such support for maintained schools should be provided from a de-delegated contingency.
- general growth in individual schools (due to popularity) where there is no overall pupil number growth in the local area. This is managed through lagged funding. This includes cases where academies have admitted above pupil admission numbers (PAN) by their own choice.

In 2023-24 the criteria for the growth fund for School Forum approval are listed below. No changes are proposed apart from to the rates, which have been increased to match the new minimum per pupil funding levels announced in July 2022.

The minimum per pupil for growth fund calculations has been updated as per the 2024-25 National Funding Formula – October 2023 update.

Bulge classes opened at the request of the local authority - £10,000 one-off start-up grant plus £94,938 ($7/12 \times £5,425 \times 30$) for a primary class of 30 opening in September. £124,758 ($7/12 \times £7,129 \times 30$) for a secondary class of 30 opening in September.

Permanent expansions approved by the local authority - £94,938 ($7/12 \times £5,425 \times 30$) for a primary class of 30 opening in September, £124,758 ($7/12 \times £7,129 \times 30$) for a secondary class of 30 opening in September.

Temporary accommodation costs incurred as a direct result of LA-approved expansions.

Independent schools transferring to VA status - Allocation based on funding formula pro-rata for months open, based on previous actual pupils on roll, plus permanent expansion funding if appropriate.

Newly established schools for which the LA is responsible to provide start-up up funding - Start-up funding of £220,000 primary/ £300,000 secondary in LA financial year of opening.

New school phases (expansions to All-through status): New phase start-up funding of £50,000 primary/ £90,000 secondary in LA financial year of opening.

Diseconomies of scale funding will be available to new basic needs academies and maintained schools opening new phases until there are pupils in every year group. No diseconomies of scale funding will be available to independent schools which become maintained. Diseconomies of scale per empty year group, paid from year after opening until pupils in all year groups. Academies are paid these rates in the current financial year with a further 5/12ths payment to cover the full academic year.

3. Falling Rolls

For the first time in 2024 to 2025 the DfE will allocate funding based on growth and falling rolls.

Funding will be allocated based on the reduction in pupil numbers that medium super output areas (MSOA) within each local authorities experience for each year. It is based on the observed differences between the primary and secondary number on roll in each MSOA in a local authority between the most recent October pupil census (2023) and the census in the previous October (2022).

Local authorities will continue to have discretion over whether to operate a falling rolls fund. Where local authorities operate a fund, they will only be able to provide funding where the 2022 SCAP shows that school places will be required in the subsequent 3 to 5 years. This SCAP requirement replaces previous guidance that funding may only be used where local planning data shows that the surplus places will be needed within the next 3 financial years.

In addition, from 2024 to 2025, the restriction that support could only be provided to schools judged 'good' or 'outstanding' at their last Ofsted inspection will be removed.

Meeting/Date	Schools Forum 19 October 2023	Agenda Item No.	
Report Title	High Needs Block (HNB) and SEND updates.		
	<ul style="list-style-type: none"> • Update on the HNB Financial Position 		
Decision/ Discussion/ Update	Update.		
Author	Karen Flanagan Director of SEND and Inclusion.		
Appendices			
Summary	Summary of HNB expenditure for 2022-2023 and predicted expenditure for 2023 – 2024.		
Recommendations	<p>The Schools Forum is asked to:</p> <ul style="list-style-type: none"> • Note the potential move from a surplus to a deficit position for 2024-2025 outlined in section 3. • Note the changes to the fair share formula. • Agree task and finish group to understand and agree next steps in terms of the funding splits for SENIF between EY block and HN block of the DSG (2.7). 		

1. Purpose of Report

1.1 The purpose of this report is to ensure that the Schools Forum continues to be consulted on financial and wider issues relating to the arrangements for pupils with special educational needs in line with the [Schools Forum Powers and Responsibilities](#).

1.2 This report provides:

- An overview of the increase in demand on the HNB from the growth in EHCPs, increased expenditure on independent placements and bespoke packages.
- An update on the financial position of Banet's High Needs Block including the likely move from a surplus position in 2023-24 to a deficit position for 2024-25. (S3) and Contingency (S4).
- Changes to the fair share formula (S5)
- Recommendations (S.6.).

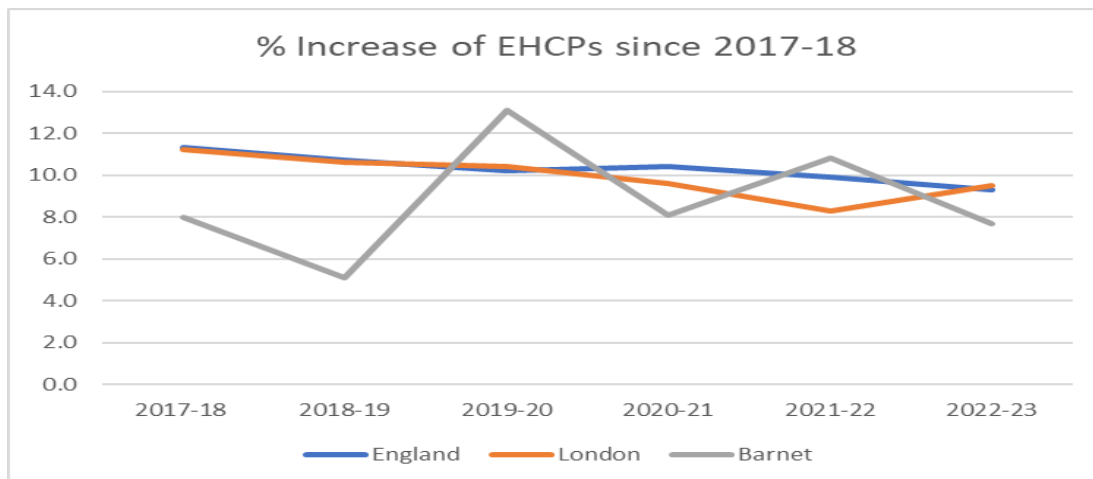
2. Increased demand on HNB.

2.1 Increase in EHCPs.

Table 1a. Increase in EHCPs since 2017.

	2017	2018	% +/-	2019	% +/-	2020	% +/-	2021	% +/-	2022	% +/-	2023	% +/-
England	287,290	319,819	11.3	353,995	10.7	390,109	10.2	430,697	10.4	473,255	9.9	517,049	9.3
London	48,554	53,975	11.2	59,672	10.6	65,853	10.4	72,193	9.6	78,203	8.3	85,601	9.5
Barnet	2,088	2,256	8.0	2,372	5.1	2,682	13.1	2,899	8.1	3,211	10.8	3,459	7.7

Table 1b. Increase in EHCPs.



2.2 Table 1a and 1b above show that Barnet's increase in EHCPs has seen far greater fluctuations than nationally or regionally. Whilst all areas have seen an increase year on year in terms of the overall number of EHCPs, the % increase each year is declining:

- From a maximum of 11.3% in 2017-18 to a minimum 9.3% increase for England in 2022.23
- From a maximum of 11.23% in 2017-18 to a minimum 8.3% increase for London in 2021.2022. This increased to 9.5% in 2022-23 but still shows a downwards increase since the high of 11.2% in 2017-18.
- Barnet shows much higher fluctuations in terms of the percentage increase, the maximum increase of 13.1% from 2019-20 and the minimum increase was between 2018-19 of 5.1%.
- Each comparator shows a lower increase in 2022-23 than that of 2017-18 although Barnet's difference is very low. If this pattern continues with lower rates of increases nationally and regionally than Barnet, it is likely that Barnet will more closely reflect the national and regional averages than is the case now.

2.3 In Barnet, the median increase in the number of EHCPs 8.05% and the mean is 8.8%. Given the downward trend nationally and regionally and the same for Barnet (albeit at much slower rate), Barnet will increasingly reflect the London and National range for EHCPs.

2.4 Home tuition, outreach, special packages including Personal budgets.

2.4.1 S19 of the 1996 Education Act makes clear that Local Authorities must "make arrangements for the provision of suitable education at school or otherwise than at school for those children of compulsory school age who, by reason of illness, exclusion from school or otherwise, may not for any period receive suitable education unless such arrangements are made for them". This applies unless the pupil will cease to be of

compulsory school age in the next 6 weeks AND does not have any examinations to complete.

- Where a child or young person is on roll to a school, we would expect the school to make arrangements for the child's education during the period they cannot attend (irrespective of whether they have an EHCP or not). This is because it is the school who has the funding for the pupil and is responsible for them.
- If the child is not on school roll, then the HNB funds the package.
- Table 2a and 2b below, show the cost of tuition or other packages has increased sharply since 2020-2021, in fact the cost has more than doubled from £600,570 in 2020-2021 to £1,341,057 predicted for 2024-2025.

Table 2a: Increased in Tuition /special packages.

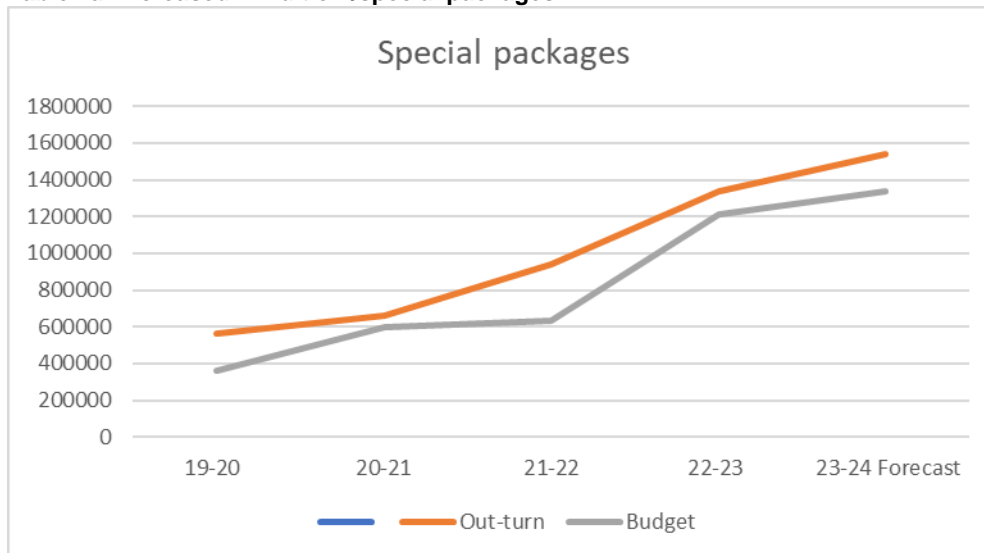


Table 2b: Increased cost of Tuition /special packages

Special packages, ABA, Personal	19-20	20-21	21-22	22-23	23-24 Forecast
Out-turn	561,114	664,477	942,181	1,337,921	1,539,995
Budget	357,801	600,570	630,000	1,213,753	1,341,057

2.5 Cost of independent placements.

- The cost of independent placements has seen an increase in number and costs particularly for independent day special schools, from £2.5m in 2019-2020 to £4.5m in 2023-24; and independent day mainstream schools which increased from ££1.9m in 2019-2020 to £2.1m in in 2023-2024.
- Top up rates vary across our special schools, but the average rate is £17k plus £10k base commissioned funding. Including commissioned base rates of £10k Barnet special school costs are between £24-34k per placement. This compares to an average of £40k for day independent special school.
- The review of the HNB also identifies this as an area that needs further exploration to reduce these costs in the long term as it is an unequitable use of the HNB funding. This would be considered by the project lead if that is agreed. (See sperate report to the Schools Forum in terms of the outcomes of the High Needs Block Review).

Table 3: increased cost is Independent Day Special and independent day mainstream

	2019/20	2020/21	2021/22	2022/23	2023/24
Independent Day	2,577,116	3,050,069	3,226,719	3,292,391	4,550,000
Independent Mainstream	1,926,308	2,357,877	2,706,868	2,847,659	2,100,000
Cost	£ 4,503,424	£ 5,407,946	£ 5,933,587	£ 6,140,050	£ 6,650,000

2.6 Therapy increases.

- 2.6.1 The cost of Therapy has also increased where the HNB funds 1:1 provision that is not able to be delivered by our provider Whittington Health. There has been significant action by the Council to improve the therapy offer including £1m from the DSG reserves which is delivering projects in school and post 16 (See appendix 1).

Table 4. Increase in Therapy costs.

	2019/20	2020/21	2021/22	2022/23	2023/24
Therapy(S</OT/Phy)	778,375	787,114	842,983	706,710	980,925
Cost	£ 778,375	£ 787,114	£ 842,983	£ 706,710	£ 980,925

- 2.6.2 We know that the increase in under 5s with an EHCP is significant and higher than the London and National averages so this is an area of increased spend that requires further exploration if the project lead is agreed.

Table 5. Increase in EHCPs for under 5's.

New EHCPs issued by Age range	England					London					Barnet				
	2019	2020	2021	2022	change since 2021	2019	2020	2021	2022	change since 2021	2019	2020	2021	2022	change since 2021
Under 5	12,398	13,359	14,428	16,450	14.01	2,381	2,556	2,517	2,828	12.35%	131	152	93	154	65.59%
Age 5 to 10	25,074	27,999	28,751	29,617	3.01%	4,294	4,842	4,683	4,763	1.70%	116	149	193	175	9.32%
Age 11 to 15	13,526	15,473	15,845	17,048	7.59%	1,878	2,069	1,965	2,006	2.08%	38	49	57	79	38.59%
Age 16 to 19	2,462	3,045	2,977	3,107	4.36%	403	455	410	450	9.75%	13	15	21	21	same
Age 20 to 25	439	221	179	134	25.13%	44	41	29	27	6.89%	3	0	0	2	plus 2

2.7 Special Educational Needs Inclusion Fund (SENIF).

- 2.7.1 SENIF is a source of funding available to early years providers claiming early education. It enables them meet low or emerging SEN for funded children.
- 2.7.2 As can be seen from tables 3a and 3b below, the cost to the High Needs Block is expected to quadruple in 2023-2024 to a cost of £400k compared to £100k in 2019-2020 (300%).
- 2.7.3 Further work is needed to better understand the significant increase in demand for the under 5's.

Table 6a. Increased cost of SENIF

	CC	Block	Out-turn 2019-20	Out-turn 2020-21	Out-turn 2021-22	Out-turn 2022-23	Forecast 2023-24
High Needs	11649	HN	100,000	45,896	100,000	303,820	400,000
Early years	10265	EY	356,686	399,998	376,580	400,000	400,000
			456,686	445,894	476,580	703,820	800,000

3. High Needs Block (HNB) Spend.

- Table 7 below shows Barnet's final HNB allocation after deductions for the last 3 years. Overall, there has been a 24.06% increase in allocation since 2021/22, 12.43% from 2021/22 to 2022/23, and 10.34% from 2022/23 to 2023/24.

Table 7: HNB allocation for last three years.

High Needs Summary	2021-22	2022-23	2023-24	Change 22-23 to 23-24	Percentage
Total High Needs Block (before deductions)	£ 60,847,000	£ 68,153,116	£ 74,823,273	£ 6,670,157	9.79%
Total High Needs Block deductions	£ 5,319,000	£ 5,720,334	£ 5,864,000	£ 143,666	2.51%
Total High Needs Block (after deductions)	£ 55,528,000	£ 62,432,782	£ 68,959,273	£ 6,526,491	10.45%

3.2 The increase in HNB allocations allowed Barnet to move from a deficit position of £2,076,689 in 2019/20, £1,556,664 in 2020/21, and £1,500,633 in 2021/2022 to a surplus of £1.4m in 2022/23.

Table 8 HNB budget: June 2023.

2021/22 Budget, Outturn 2021/22, and updated Budget 2022/23

Area	Outturn 2019/20	Outturn 2020/21	Outturn 2021/22	Outturn 2022/23	Budget 2023/2024
Place funding and PRU top-up	6,481,307	6,728,180	7,852,798	8,463,297	9,106,819
Top-up ARPs	3,122,850	3,457,697	4,134,091	4,493,621	4,668,937
Top-up Special schools	8,372,353	9,305,625	10,157,696	11,354,437	12,442,775
Top-up Post 16	3,997,222	3,979,617	3,970,086	4,417,766	4,596,143
Mainstream top-ups	9,953,967	10,445,714	11,041,201	12,428,941	13,998,188
Top-up Out of Borough	2,530,453	2,612,811	2,790,042	2,722,071	3,056,617
Independent sector	7,926,614	9,337,038	10,920,469	10,650,946	11,560,000
Other Hard to Place pupils, Hospital Funding, Autism Strategy,	4,851,923	5,365,598	6,162,251	6,443,586	9,460,627
Total expenditure	47,236,690	51,232,281	57,028,633	60,974,664	68,890,106
Budget	45,160,000	49,675,617	55,528,000	62,432,780	68,890,106
Variance	-2,076,689	-1,556,664	-1,500,633	1,458,116	0

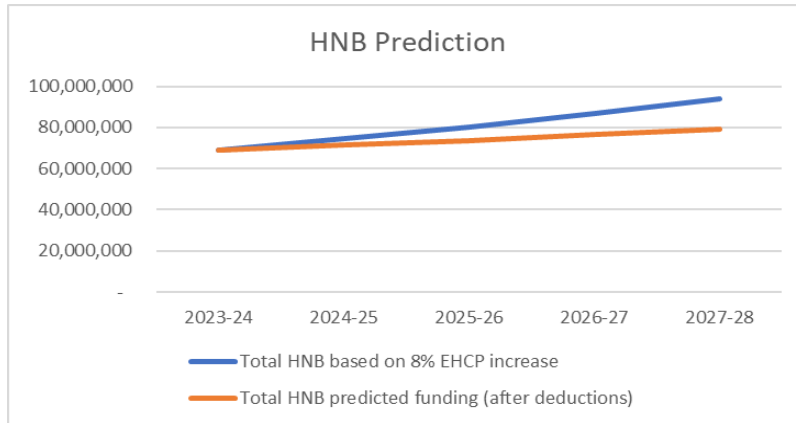
3.3 On average the increase in the HNB allocation since 2020/21 was circa 10% per year. The predicted allocation for 2024-25 is significantly lower at 3.75% (Table 9a).

3.4 Table 9b provides an illustration of the impact on Barnet's HNB position should the allocation not increase in year (or in future years), and the growth in the number of children and young people supported by EHCPs increases at an average of 8% per year. (See data analysis report on this agenda).

3.5 This would mean the HNB will fall into a deficit position of £3m from 2024-25, increasing year on year.

Table 9a. Predicted HNB allocation 2024-2025.

High Needs Summary	2021-22	2022-23	% Increase	2023-24	% Increase	2024-25	% Increase
Total High Needs Block (Before Deductions)	£60,847,000	£68,153,116	12.01%	74,823,273	9.79%	£77,629,536	3.75%
Total High Needs Block deductions	£5,319,000	£5,720,334	7.55%	5,864,000	2.51%	£6,039,920	3.00%
Total High Needs Block	£55,528,000	£62,432,782	12.43%	£68,959,273	10.45%	£71,589,616	3.81%

Table 9b. Illustrative impact of reduction of the HNB**Table 9c. Illustrative impact of reduction of the HN: figures.**

	2023-24	2024-25	2025-26	2026-27	2027-28
Total HNB based on 8% EHCP increase	68,890,106	74,401,314	80,353,419	86,781,693	93,724,228
Total HNB predicted funding (after deductions)	68,890,106	71,301,259	73,796,804	76,379,692	79,052,981
Deficit	0	-3,100,055	-6,556,616	-10,402,001	-14,671,247

3.6 It is important to note that in previous years there have been changes to the allocation and additional grants (such as the 3.4% to fund SP school and PRU increases) made during the course of the year. The High Needs Block Allocation may therefore increase, any changes will be reported.

4. Contingency.

4.1 As reported to the March 2023 School Forum, the previous increases in HNB led to a surplus of £1.4m (table 2a above). Following additional expenditure, the overall surplus for 2023-2024 will be circa £900k.

Table 10. predicted contingency 2023-2024

	CC	Budget	Draw down	Comments
Budget contingency	11649	2,345,692.00	55,000.00	Assistant Psychologist. EBSA Support
			£45,000.00	Nurture groups
			144,000.00	Import/export errors adjustments
			250,000.00	Planned increases in special, ARP and PRU top up rates.
			491,057.00	Increased spend on Independent and Outreach/tuition services
			330,794.00	Barnet Mainstream top-ups - initial forecast shows that the primary school top-up funding will exceed the budget
			134,983.00	ARPS, OOBs
		Total	1,450,834.00	

		Balance remaining to spend	894,858.00	
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4.2 Careful consideration will be needed with regard utilisation of the reserves as funding will be needed to:

- Further develop the universal offer in terms of what is ordinarily available.
- Fund any agreed recommendations arising from the HNB review.

5. Fair share.

- Please note the small change to fair share calculations. We will now take into account all EHCPs in a school – Out of Borough (OOB) as well as Barnet EHCPs when making a decision. We will also make a payment where a school is going into a deficit position in year. Previously this was Barnet EHCPs only and a payment would only be made when the school was already in a deficit position.

6. Recommendations.

- a. The Schools Forum is asked to note the recommendation in the HNB review report to recruit a full time project lead. This post will support mitigation where possible on the extent of the HNB deficit. The aims of the role will be to
 - conduct further analysis of areas of spend including:
 - Individually funded packages and the cost saving of developing a centralised outreach service that both schools and LA can ‘buy in to’.
 - The reasons for increased numbers of placements in the Independent Sector.
 - There is already a review of Barnet’s expectations of what is ordinarily available, this should be linked with the outcome of the review (if agreed) of alternative pathways for funding without recourse to an EHCP. Any such approaches should ensure these are peer moderated and should include all funding agreement, irrespective of whether it is funding attached to an EHCP or otherwise.
 - Alternative, moderated approaches to funding pupil without recourse to an EHCP.

----- Report ends -----

Appendix 1. Communication, Sensory and Functional Skills School Project

The Specialist Inclusion Service (SIS) has partnered with Whittington Health to create a joint project. This project is funded by the dedicated school grant awarded by the school forum. The aim of the project is to provide 2 Speech and Language Therapists (S<) and 2 Occupational Therapists (OT) to fulfil the project's objectives. It is important to note that this project is separate from Whittington Health's current universal or targeted S< and OT offer.

The aims of this project are to:

- *Improve communication, sensory and functional skills outcomes for SEND young people at Ordinarily Available and targeted support.*
- *Review and update EHCP advice and recommendations for OT and S< for KS3 and KS4 and those transitioning to post-16.*
- *Offer every school standardised training and support to develop skills from a speech and language therapist and an occupational therapist.*
- *Co-produce standardised communication, functional skills, and sensory support levels with an award program for all Barnet schools.*

- *Provide training to build knowledge and skills for Special Schools and ARPs with priority for newly opened provisions.*

Currently, there are 3 task finish groups of professionals and school representatives working together to review the Ordinarily Available offer in Barnet and develop toolkits and training to support schools and colleges.

Schools and provisions will be contacted by speech and language and occupational therapists as the project rolls out. They will offer key elements of support for the project as it develops. All schools are encouraged to participate in the training, workshops, and support that will be provided.

Additional item: Proposed use of DSG underspend

- 1.1 The forecast carry forward of Dedicated Schools Grant funding at the end of 2023/24 is £8.208m. Carried forward DSG reserves have generally been used to support pressures in the DSG High Needs budget and the growth in Education, Health and Care Plans means it would be prudent to retain most of this surplus to support the High Needs budget in 2024-25. However, as the reserve is forecast to be very healthy again at the end of the 22/23 financial year, it is proposed to allocate, if required, some of the current DSG surplus to schools and settings, as indicated above. In summary, it is proposed to expand the criteria for the existing use of DSG reserves i.e. to include children from Israel and Gaza to the Hong Kong and Asylum Seeker hotel children and allocate additional carried forward underspend, if needed, as follows:

New arrivals (displacement of children from Israel and Gaza) up to: £250,000

New arrivals – displacement of children from Israel and Gaza

- 1.2 It is anticipated that the situation in Israel and Gaza will lead to an influx of families from these areas into Barnet, with the children seeking school places. The Jewish Agency for Israel believes there could be between 200 to 300 families who will move, temporarily, from Israel into London. With such an established Jewish community in Barnet it is anticipated a large number of these will come to Barnet. Any of these families with dual nationality (i.e British Citizens) have a right to attend school in the UK.
- 1.3 In addition Palestinian families may apply for asylum status if they arrive in the UK. Local authorities hold the statutory duty to provide sufficient school places. Any such family can apply for a school place for their children.
- 1.4 As Barnet has among the highest number of Jewish families in England it is anticipated that Barnet will be a favoured destination for the Israeli families. In the last week applications for admission to Barnet schools from displaced Israeli families have begun with the first two children starting in Barnet schools this week. A further 4 have made applications and are going through the admissions process.
- 1.5 A major financial challenge for schools arises because these enrolments are after the October school census date, which means that they do not generate funding for the school through the local funding formula until the financial year after the school year when they appear on a census at their Barnet school (so 2025-26 budget year for new arrivals starting school between October 2023 and September 2024).
- 1.6 This creates financial challenges for many schools, as they incur extra costs to support the welfare and regular attendance of the children from these families. Schools may incur extra staffing costs, whether for extra teachers (or fractions of teachers), teaching assistants and other support staff or for specialist mentors to support individual children. Some incur extra costs for extra school clubs and for providing English as an Additional Language support. In addition, it is expected that these children may require trauma informed pastoral support.
- 1.7 It is therefore proposed to allocate additional one-off funding, if required, from the DSG underspend in the Dedicated Schools Grant to support schools that enrol children after the October 2023 census date for the period these children are in schools up until the end of the summer term 2024. More details of the proposal are set out below.
- 1.8 In January 2022 Schools Forum agreed to use up to £1m of DSG Reserves for new arrivals into schools (after the October Census) from Hong Kong or one of the Asylum Seeker hotels. As only £250,000 was used from this £1m Schools Forum agreed to carry forward £750,000 to use in

the 2023/24 financial year for asylum seekers from the Barnet hotels. To date schools have allocated £558,742.33 of this funding leaving a current balance of £441,257.67

- 1.9 Schools Forum are asked to agree to the expansion of this criteria to also include new arrivals from Israel and Gaza and to approve an additional sum of £250,000 to be used, from the DSG reserves, if required.

Approach to funding of new arrivals

- 1.10 The below approach is identical to the approach being used for Hong Kong and Asylum Seeker (from designated hotels) families but is expanding the use for Israeli and Palestinian enrolments in Barnet schools.
- 1.11 The technical mechanism for providing the funding for new arrivals, as it will sit outside the school funding formula, is to allocate the money toward 'ongoing local authority statutory responsibilities for all schools in respect of the welfare and attendance of pupils'. The allocation requires the agreement of the Schools Forum and the proposals for spending the money also requires the agreement of the Schools Forum.
- 1.12 The Schools Forum is asked to approve the allocation of this funding. The Forum is also asked to approve the following proposed approach to the funding
- The funding will be capped at £1m and will be one-off for the financial year 23-24 only.
 - The payments should be based on an agreed proportion of the 2023/24 AWPU funding for schools for each eligible pupil, with the proportion being adjusted to ensure the total allocation is within the agreed £1m budget (i.e. carried forward £750k plus additional £250k).
 - Funding is for all children from Israel and Gaza who enrol in Barnet maintained primary and secondary schools and primary and secondary Academies after the October 2023 school census date with payments being calculated pro-rata for the weeks they attend up to the end of July 2024.
 - The proposals, if agreed by the Schools Forum, will be recommended for approval by authorise the Executive Director, Children and Families, who will then approve the amounts to be paid to eligible schools.

Recommendations:

We are asking that Schools Forum

- i. Agree to the expansion of criteria as outlined above
- ii. Agree the proposed use of additional DSG balances, if required as set out above
- iii. Agree the proposed approach to funding new arrivals as set out above.