

MINUTES OF THE OF THE SCHOOLS' FORUM
HELD on 17 December 2024
VIRTUAL MS TEAMS MEETING
(10:00am to
12:00pm)

Present:	Maintained Primary Representatives	
	Scott Halliwell (SH (Co-Chair)	HT, Southwood Primary School
	Julie Philips (JP)	HT, Godwin Primary School
	Gill Massar (GM)	HT, William Bellamy primary School
	Richard November (RN)	HT, Valence Primary School
	Simon Abeledo (SA)	HT, Rush Green Primary School
	Junaida Bana (JB)	HT, Furze Infant School
	Sara Rider (SR)	HT, Monteagle Primary School
	Maintained Secondary Representatives	
	Tony Roe (TR)	HT, Barking Abbey School
	Lisa Keane (LK)	HT, Eastbury Community School
	Maintained All-through (A/T)	
	Russell Taylor	HT, Robert Clack School
	Governor Representatives (1 Pri & 1 sec)	
	Vacant	
	Vacant	
	Academy & Free Primary	
	Lisa Shepherd (LS)	HT, Eastbury Primary School
	Academy & Free Secondary	
	Andy Roberts (AR)	HT, Riverside School
	Academy & Free Schools (A/T)	
	Clare Cross (CC)	HT, Sydney Russell School
	Academy Special School Representative	
	Roger Leighton (RL)	Chief Executive, Partnership Learning
	Maintained Special Schools Representative	
	Jo Long (JL)	HT, Trinity School
	Maintained PRU Representative	
	Cathy Stygal (CS)	HT, Mayesbrook Park School
	Early Years Representative	
	John Trow-Smith (JTS)	Early Years, Local Authority
	Trade Union Representatives (shared role)	
	Dominic Byrne (DB)	NUT
	John McGill (JMcG)	NASUWT
	Church of England Representative	
	David Huntingford (DH)	HT, William Ford C of E Junior School
	Catholic Representative	
	Clare Cantle	HT, All Saints Catholic School
	14-19 Representative	
	Natalie Davison	Principal, Barking and Dagenham College

Also present: Jane Hargreaves (JH) – Commissioning Director, Education; Councillor Elizabeth Kangethe (CEK) – Cabinet Member for Educational Attainment and School Improvement; Kofi Adu (KA) – **Head of Finance**, Local Authority Finance; Patricia Harvey (PH) – Senior Professional, High Needs Block; Local Authority Finance ;Florence Fadahunsi (FF) – **Senior Finance Business Partner**, Local Authority Finance; Caroline Connolly (CCo) – **Finance Business Partner**, Local Authority Finance; Gurmit Kaur (GKa) – **Schools Senior Accountant**, Local Authority Finance, Ronan Fox (RF), John McGill (JMcG) – NASUWT, Dominic Byrne (DB) – NUT, John Trow Smith (JTS) – Early Years, Local Authority, Rikke Damsgaard (RD) – Strategic Lead for Early Years and Childcare); Lisa Keane (LK) - Eastbury Community School, Tony Roe (TR) Barking Abbey School, Andy Roberts (AR) – Riverside School, Clare Cross (CC) Sydney Russell School, Jamie Bell (JB) – Warren Junior School, Julie Philips (JP) – Godwin School, Richard November (RN) – Valence School, Simon Abeledo (SA) - Rush Green School, David Huntingford (DH) – William Ford School, Cathy Stygal (CS) – Mayesbrook Park School, Jo Long (JL) – Interim Head of Trinity School, Sara Rider (SR) – Monteagle School, Scott Halliwell (SH) – Southwood School, Russell Taylor (RT), James smith (JS) – Thames View Junior School, Robert Clack School, Roger Leighton (RL) - Chief Executive, Partnership Learning, Lynne O'Meara (LOM) – Barking & Dagenham College and Karen Pyle (KP) – Local Authority Minute Clerk.

Mr Roger Leighton chaired the meeting, Mr Scott Halliwell to chair the October 2024 meeting.

1.0	<u>APOLOGIES FOR ABSENCE</u> None				
2.0	<u>DECLARATION OF INTEREST</u> None				
3.0	<u>MINUTES AND MATTERS ARISING</u>				
3.1	The minutes of the meeting held on 15 October 2024 were confirmed as an accurate record.				
	<u>Update on previous actions:</u>				
	No.	Date of Meeting	Item No	Action	Owner
	1	15.10.24	4.2	KA to send JTS the guidance regarding EY reserves. EYS reserves are not ringfenced	KA
	2	15.10.24	4.3	RL asked how realistic the £500k saving on the OOB line was? The finance team have been advised that this is realistic (some pupils have already been moved) but the Head of SEND is unavailable today. An update will be given at the next meeting. KA to update on the agenda	KA
	3	15.10.24	4.6	Finance to remodel growth funding calculation to make it affordable within the cash envelope Both on agenda today The group agreed to revise falling rolls criteria to as a percentage of a school	KA

4.0 REPORT FROM HEAD OF FINANCE / GROUP FINANCE MANAGER

4.1 Update on Schools, Central, High Needs and EY DSG Block Allocations

- The DfE has published a revised allocation for the 2024/25 Dedicated Schools Grant (DSG), in November 2024. The current DSG allocation for LBBB is a total of £365.6m across the four blocks (excluding academy recoupment). Adjustments have been made to the latest allocation published on the 19th of November. There has been a reduction of £1.767m to the overall DSG allocation.

Table - Updated DSG Grant Allocation for 2024/25 (in £'000s) is below

2024/25 DSG allocation as a July				2024/25 DSG allocation as at Nov			
	Before recoup't £000's	Less recoup't & Rates £000's	Net £000's	Before recoup't £000's	Less recoup't & Rates £000's	Net £000's	Movement £000's
	(a)	(b)	('c) = (a) - (b)	(d)	(e)	(f) =(d) - (e)	(g) = (f) - (c)
Schools Block	215,144	18,082	197,062	215,144	18,391	196,753	(315)
Central Block	2,118	0	2,118	2,153	0	2,153	35
High	56,586	5,013	51,573	56,580	5,013	51,567	(6)
Early	32,633	0	32,633	31,152	0	31,152	(1,481)
	367,081	83,094	283,987	365,629	83,094	282,219	(1,767)

- There has been a significant net reduction of **£1.481m** in the Early Years funding. This change is due to a drop in the take up of the 2-year-old entitlement for working parents (£1.559m) offset by an increase of £488k in the number of hours for the under 2- year-olds.
- The School Block allocation has reduced by **£315k** because of a change to the amount recouped to fund academies. The small change of **£6k** on the High Needs block is due to the import/export adjustments. The increase in the central block is due to an increase in the unit funding of 85p per pupil.

Comments and discussion:

JTR asked KA about the reduction of the two-year-old entitlement for working parents and is it versus the take up projected by central government or is it that an actual term on term reduction in the number of hours taken up within the borough?

KA replied, it is a term on term reduction.

TR asked KA where he got the additional £315k taken for academy recoupment is that to do with numbers of pupils in academies?

KR confirmed that it is mainly to do with numbers of pupils in academies.

Recommendation (i): Schools Forum is requested to:

- (i) Note the updated DSG funding for 2024/25.

	All noted. There are no actions to be taken.		
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4.2 2024/25 Projected DSG Outturn

- The table below outlines the projected DSG outturn for 2024/25. Among the funding categories, Schools, Central and Early Years blocks anticipate achieving a breakeven position at year end. Conversely, the high needs block is forecasting an overspend of **£5.311m**. This reported position has worsened due to increase cost of Outreach and home tuition service.
- There's a potential increase in cost for post 16 due to demand pressure, the impact of this pressure will be reported to school's forum at the spring meeting.
- DSG reserves brought forward from 2023/24 is **£7.750m**. The projected overspend of **£5.311m** is due to the pressures on the High Needs Block. The adjusted reserve for the current financial year is **£2.439m** following the clawback of EY funding of **£205k**. The reserve balance includes **£937k** earmarked for growth/falling rolls funding and **£785k** allocated to support Schools Facing Financial Difficulties (SFFD).

	2024/25 Funding £'000	2024/25 Projected Outturn Oct2024 £'000	Dec-24 Surplus / (Deficit) £'000	Oct-24 Surplus / (Deficit) £'000	Movement from October Favourable/ (Adverse)
Schools Block (ISB)	197,347	197,347	0	0	(0)
Central Services Block	2,153	2,153	0	0	(0)
High Needs Block	51,567	56,878	(5,311)	(4,025)	(1,286)
Early Years Block	31,152	31,152	0	0	0
	282,219	287,530	(5,311)	(4,024)	(1,287)
DSG reserves B/f	7,955	(205)	7,750	7,750	0
Revised DSG Carried forward			2,439	3,726	(1,287)
Of Which					0
Growth/Falling Rolls		(937)			0
SFFD retained centrally		(785)			0
Projected DSG Reserves 2024/25			717	2,004	(1,287)

Table: DSG outturn 2024/25

Recommendation (ii): Schools Forum are requested to:

(a) Note the 2024 / 25 projected outturn

All noted. No actions to be taken.

4.3

Update on 2024/25 Projected High Needs Outturn & Savings Proposals

Table – High Needs Outturn

Service Area	2023/24 Outturn	2024/25 Budget	2024/25 Outturn Forecast	Variance +surplus / (deficit)
Alternative Provision	3,369,139	3,728,080	4,362,619	(634,539)
ARP Funding	9,789,848	11,040,112	9,803,161	1,236,951
Education Inclusion.	1,945,955	2,115,587	2,182,386	(66,799)
Out of Borough & Non-Maintained Funding	10,371,272	8,318,115	9,360,669	(1,042,554)
HN Top Ups – Post 16	2,664,888	2,413,600	3,961,511	(1,547,911)
SEN Panel Top Ups	5,474,350	2,661,000	5,535,854	(2,874,854)
Provision Payments	2,790,000	3,000,000	2,440,000	560,000
Aspire Virtual School	380,035	372,999	372,999	0
Initiatives - Rapid	903,872	772,601	772,601	0
Special School Funding	14,438,249	15,252,455	16,446,718	(1,194,263)
EY Portage & Youth	471,527	658,432	404,597	253,835
Parent Support Projects (Phoenix,	0	666,416	666,416	0
Words First & SALT	570,315	568,000	568,000	0
Total Budget	53,169,450	51,567,397	56,877,531	(5,310,134)

The High Needs working group met on 26th November 2024 and reviewed the current year outturn position and ongoing pressures for 2024/25 and 2025/26. The group discussed in detail:

- Benchmarking of other London boroughs and detailed SEN2 returns, including each LA forecast outturn of DSG reserves and Safety Valve programs or Delivering Better Value Programs (DBV) to identify possible High Needs working initiatives that the group could review directly with LAs to mitigate known current in year pressures.
- 5 other London LAs with DSG surplus balances was discussed and review of their published banding rates for mainstream schools and top up rates in comparison to LBBB.
- Proposed savings for 2025-26 to balance the High Needs block and implication to schools, specific individual school examples was discussed at the meeting and noted.
- DfE recent briefings for High Needs Block allocations 2025/26 and NFF estimated increase in funding.
- The high needs NFF will ensure that every local authority receives at least a 7% increase per head of their projected cohort aged 2 – 18. LBBB is likely to receive 8.8% uplift in funding for 2025/26. This is equivalent to £4,978,588 increase above 24/25 allocation.
- This indicative allocation means, we may not have to implement the full savings strategy previously discussed, (e.g. % reduction in top-up rates, stopping year 7 top-up rates may have to be paused, however some of the savings such as reduction in central services spend & provision payments may have to be

reviewed to set a balanced budget and respond to growth & demand in 2025/26).

Comments and discussions:

SH commented although we're saying we are saving money from out of borough, the special school funding has gone from £1m in surplus to £1m in deficit therefore swung £2m, whereas out borough only reduced by £1m there is a £1m difference there.

KA replied reductions are a combination of things that's going on in terms of out of borough and special schools. One is the recoupment reduction of around 700,000 and an increase in commissioning places within special schools. We are paying more to our special school as a result. The third strand relates to transitioning from out of borough places to in borough special schools.

SH also commented that although the 24/25 budget is set but reduced by 700,000, but it's also set because that is our envelope, however the SEND panel top ups outturn and last year was £5.4m – we have £2.6m in the budget. That was never going to be to budget anyway but we have to work within what we are given.

KA added – in terms of top up the budget, this has been increasing year on year due to demand and schools are presenting the increase in those who need help and support from this budget line, there is a surge in demand for the service going forward and that's one of the reasons why we were discussing about reviewing the provision payments as those are interlinked more or less and those two pots of funding need to be managed to enable it to be sustainable going forward.

SA commented – What is the surplus on the ARP funding?

KA replied the £1.2m is established there because we are putting a lot of growth in the last 2 years – more places within our primary and secondary schools, and although the increase in places within our two phases did go up but not as much as the budget provision we made and that has contributed to the £1.2m which is more or less supporting the pressure areas within the budget lines. We are in the process of setting that budget for next year and will share that in the next meeting in the Spring.

TR- Is there a review of out of borough placements coming and can this include how much in-borough ARP placements cost per pupil compared to the cost we charge for an out borough pupil (i.e. would we charge Havering the equivalent as Havering would charge us?)

KA – schools are responsible for charging out borough pupils occupying ARP places within our local schools. They should raise an invoice to the responsible LA. The LA does not recoup out of borough places for our ARPS. schools can use the same rate for paying ARP top-up funding to charge OOB pupils.

MN – responding to TR point. There will be more detail around out of borough costs in January and responding to SH point about out of borough costs for independent provision costs for top up, as KA clarified that the charging rates vary across all local authorities for those top up costs. With regards to the £5.5m outturn in top up costs the review of the same provision that was requested by the sounding board last year would definitely need to happen and the process could be started this year, the costs of top up and the funding overall needs to be linked to the SEND provision across our local authority. The review needs to be done together and definitely needs to start to take place this year.

JH- pointed out that the charges for out of borough in ARPs should be a very small number because we are not building ARPs or developing ARPs for out of borough children. In terms of the underspend in ARPs, this was due to not opening as many new places as we planned. Some of those will go into next year. We are trying to just open as we need them and there will be a need for secondary ARP places in September 2025. This is being looked at currently. It is important to look at what we charge for top up for those ARP places, but it will be throughout the borough, and just a

	<p>few children because we wouldn't be planning them into our provisions.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Recommendation (iii): School Forum are requested to:</p> <p>Note and comment on the 2024/25 High Needs outturn position.</p> <p>Noted. Comments above.</p> </div>	
<p>4.4</p>	<p><u>Update on Early Years</u></p> <p>The DfE has provided information for LA's to prepare for the next financial year and has therefore confirmed the following policy updates ahead of the 2025-26 funding rates announcement.</p> <p>The following changes to local rules will apply in 2025-26:</p> <ul style="list-style-type: none"> • Pass-through requirement will increase from 95% to 96% in 2025-26, with plans to move to 97% once the new entitlements are sufficiently embedded. • On the timing of local funding rates to providers: The DfE has abolished the 8-week window within which LAs need to communicate providers' rates. Instead, in 2025-26, the Early Years funding operational guidance will be updated for all LAs to inform providers of their rates no later than 28th February, this will be formalised in regulations from 2026-27 onwards. <p>Comments and discussions:</p> <p>JTS- Anything that is unspent needs to go towards the deficit, in a deficit year we could lose control of decision making and its automatic that anything that is unspent in any block goes towards the overall DSG deficit.</p> <p>RL- Asked if there are any implications for the borough and what it provides centrally of the reduction in what can be held centrally?</p> <p>KA- responded, there is very minimum, if any implications for the borough because of the reason that the Government has introduced an extension to the EYs offer of bringing in under two year olds. Prior to that we had three and four year olds within early years but now the extension has included under two year olds which has brought in additional funding for LAs.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Recommendation (iv): School Forum are requested to:</p> <p>(a) Note the update on Early Years budget for 2025/26 - Noted</p> </div>	
<p>4.5</p>	<p><u>National Funding Formula (NFF) - Indicative Funding 2025/26</u></p> <p>Provisional funding allocations was announced at the end of November 2024. Total core school funding is increasing by £2.3bn in 2025/26 bringing the funding total to £63.9bn nationally compared to £61.6bn in 2024/25. This includes funding through the schools NFF, high needs, central school services block and pupil premium. £1bn of the £2.3bn increase is being allocated as high needs funding, bringing the total high needs budget</p>	

to **£11.9bn** nationwide.

The DfE have committed to further funding in 2025 to 2026 to cover the increase in employers National Insurance Contributions. This allocation will be in addition to the funding announced above in paragraph 5.1

Funding for mainstream schools through the NFF is increasing nationally by **2.23%** per pupil compared with 2024/25. This includes a 1.28% increase to ensure the 2024 teachers and support staff pay awards continues to be fully funded.

The 3 grants paid separately in 2024/25 will now be rolled into the core school budget these are:

- **Teachers Pay Additional Grant (TPAG):** – funding to support schools with the September 2023 teachers’ pay award. TPAG funding was allocated for the 2024/25 financial year for mainstream, special and AP schools
- **Teachers’ Pension Employer Contribution Grant (TPECG):** funding to support employers with the increase in the employer contribution rate. TPECG funding was allocated for the 2024/25 financial year for mainstream schools, high needs settings, and LA’s with centrally employed teachers.
- **Core School Budget Grant (CSBG):** funding to support schools with their overall costs including the 2024 teacher pay award. CSBG funding was allocated for September 2024 to March 2025 for mainstream schools, special and AP schools. This additional funding will form part of the schools’ core budget in 2025/26 and subsequent years.
- The Schools NFF will use the same factors as 2024 to 2025, with some changes to the PFI factor. Funding protections will continue to be based on a minimum per pupil level (MPPLs) and a funding floor will be cash flat @ 0% so that schools will be protected from per cash reductions in their pupil led funding.

The only structural changes being made to the NFF are in relation to the PFI factor:

The changes are:

- a) Providing pro-rata funding when a PFI contract is coming to an end in the financial year.
- b) Setting conditions that LA’s would need to meet to receive above-inflation increases in PFI funding on an exceptional basis. The default position is that the previous year’s PFI funding through the NFF will be increased by the Retail Prices Index excluding mortgage interest payments (RPIX) measure of inflation.

The LA will take advantage of the flexibility to model different basic entitlement values to achieve the optimum values to get closest to the NFF cash envelope.

The DfE have set minimum and maximum values for the basic entitlement of primary, KS3 & KS4. Keeping within this range of values enforces ‘tightening’, bringing the local funding formula closer to the NFF.

Factor	2025 to 2026 national funding formual (NFF) value including area cost adjustment (ACA)	2025 to 2026 authority proforma tool (APT) minimum value	2025 to 2026 authority proforma tool (APT) maximum value
Primary basic entitlement	£ 4,339.65	£ 4,231.16	£ 4,448.14
KS3 basic entitlement	£ 6,116.34	£ 5,963.43	£ 6,269.25
KS4 basic entitlement	£ 6,895.83	£ 6,723.44	£ 7,068.23

LBBB NFF Allocation	2024-25	2025-26	Change	% change
Pupil Nos*	40,519	40,519	0	
Primary Unit of Funding (PUF)	£5,737	£6,165	428	7.46%
Secondary Unit of Funding (SUF)	£7,741	£8,351	610	7.88%
LA Allocation excl growth & premises factors	£264,925,768	£285,227,768	£20,302,000	7.66%
LA Allocation through premises funding	£9,636,861	£11,721,990	£2,085,129	21.64%
Allocations through additional grants	£15,178,021	£0	(15,178,021)	
Total SB baseline (excluding growth)	£289,740,650	£296,949,758	£7,209,108	2.49%
Baseline per pupil (excluding growth)	£7,151	£7,329	£178	
Provisional % change in 205/26 DSG Baseline			2.49%	

Comments and discussions:

RL questioned- what does it mean when it says will be rolled into the core school budget?

KA responded - in terms of this FY the three different strands of grants have been paid to schools separately, independently of core schools' budget. From next year, 2025/26 the grant will not be received separately, it will be part of the core funding that schools receive through the budget share and will be rolled into the national funding formula. The formula led factors will be used to calculated it.

(The NFF is increasing nationally by 2.23% per pupil. That is per pupil compared with 2024/25 base budgets plus the three budgets (TPAG, TPECG, CSBG).

SH questioned, is the DfE talking at national level when quoting fully funded because it is not at individual school level? My understanding is it is not going to fund anything further for any increase in September 2025 which is potentially 2.8%, so it's all smoke and mirrors, we are not getting enough funding to cover pay rises no matter what the DfE say.

KA responded – We have not received confirmation from the DfE about the 2.8% for next year. However, we have shared today that the funding for pay awards has been found at the national level.

Recommendation (v): School Forum are requested to:

Note and comment on proposed Local formula funding model for 2025/26.-
Noted

4.6

Schools Block Funding Formula

LBBB will continue to use its restricted local budget setting powers, to set the 2025-26 individual school's budget. The national funding factor rates have been adopted across all the mandatory factors except for the basic entitlement (AWPU). The DfE have set the limits on the amounts that can be allocated to Age Weighted Pupil Unit (AWPU), this ensures a move closer to the NFF.

Pending the publication of the Authority Pro-Forma Tool (APT), we are consulting on the principles of the methodology to be adopted for 2025/26. The following models of the schools' block funding have been produced for consideration. The underlying assumptions across the 2 models presented are as follows:

- The models are based on 2024/25 pupil numbers (40,519) and pupil characteristics
- Modelling excludes growth funding as NFF provisional allocation excludes growth allocation
- MFG figure is provisional and based on 2024/25 amount. This may change once the APT is published.

The 2025/26 assumed NFF provisional cash envelope for LBB is **£296,949,758**. This does not include funding for growth and falling rolls. LA's will be notified of the growth and falling rolls when the allocation is published later this month.

The Models – Appendix A

Model A

- Replicates the NFF factor values for all mandatory factors.
- MFG at 0% but assumes the value of £2m from 24/25
- This model is not affordable, because it exceeds the funding allocation by £127k.
- This model will also impact primary schools, as the funding ratio shifts funding from primary to secondary phase.

Model B

- Replicates the NFF factor values for all mandatory factors **except** for the basic entitlement, which has been slightly adjusted to ensure the Funding allocation is not exceeded.
- MFG budget assumed to be £2m
- This model ensures the full allocation is distributed across the formula.
- The model is fairer for primary schools but does not disadvantage secondary schools either. All secondary schools will receive an uplift in funding as compared to 2024/25.

When considering the models it is the underlying principle that is important. The final values will depend on the release of the October census and the final DSG allocation for 2025/26.

	Funding Model Cost	DSG Grant	Surplus / (shortfall)
	£'000	£'000	£'000
Model A - Full NFF	£297,077	£296,950	(£127)
Model B- Adjusted NFF AWPU rates	£296,949	£296,950	£1

The final formula will be updated following the release of the APT by the DFE. We will report the final indicative allocation per school level at the January 2025 meeting.

Comments and discussions:

KA – Discussed the consultation that the LA want to do with schools in setting the budget and explained model A and model B. A further model C can also be consulted

on when the funding is decided and once the figures have been released in January. The consultation will close by 10th January 2025.

JH- commented with regards to the questions, (1) do we want schools to support remaining within the cash envelope and (2) do schools support tweaking the AWPU to support primary schools? Those are the questions and we want to put the questions first then the models after.

KA- Schools will get the full details of this once you receive information on the consultation pack and schools will see all the various questions to be answered and responded to.

Recommendation (v): School Forum are requested to:

- (a) Note the principles to be consulted with schools for the funding models.
- (b) Note deadline for consultation with schools on the funding principles is on 10th January 2025.

4.7

Revised Growth Fund Allocation

- Growth funding is allocated to Schools to manage an increase in pupil numbers in 2024-25 before the lagged funding catches up.

The criteria for the growth fund are as below:

- 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.
 - where a school or academy has agreed with the local authority to provide an extra class to meet basic need in the area (either as a bulge class or as an ongoing commitment), regardless of whether the additional class is within or outside of the PAN.
- The growth fund must not be used to support:
 - Schools in financial difficulty, any such support should be met from the de-delegated contingency.
 - General growth due to popularity, this is managed through lagged funding

At the October meeting, school’s forum agreed to keep the growth fund within the DfE allocation of **£1.181m** for 2024/25. The growth allocation for each LA is set at a rate of **£1,550** per new primary pupil and **£2,320** per new secondary pupil, plus a lump sum o **£76,195** for each brand-new school.

The table below sets out the revised growth allocations for the schools which meet the growth fund criteria. The DfE rates mentioned in 7.3 above have been applied to the growth numbers instead of the previous rates used for calculating LBBG growth allocations.

By remodelling the growth fund calculations, there is a surplus of £276k which can be used to offset falling rolls fund.

School	Pri Nos	Sec Nos	Sep24 Growth Nos	Calculation based on LBBD AWPU rates			Calculation based on DfE rates			Reduction
				Prim. Growth £2,406.43	Sec. Growth £3,434.67	Total Growth Allocation 2024/25	Prim. Growth £1,550	Sec. Growth £2,320	Revised Growth Allocation 2024/25	
Eastbrook School		30	30	0	103,040	103,040	0	69,600	69,600	33,440
Ripple Primary School	30		30	72,193	0	72,193	46,500	0	46,500	25,693
Riverside Primary (Free School)	60		60	144,386	0	144,386	93,000	0	93,000	51,386
Riverside Secondary (Free School)		30	30	0	103,040	103,040	0	69,600	69,600	33,440
Robert Clack School of Science	60	180	240	144,386	618,240	762,626	93,000	417,600	510,600	252,026
Greatfields School	30	30	60	72,193	103,040	175,233	46,500	69,600	116,100	59,133
Total	180	270	450	505,349	927,360	1,360,517	279,000	626,400	905,400	455,117
DFE Growth Fund Allocation 2024/25									1,181,691	
(Shortfall)/ Surplus Growth Allocation						(178,826)			276,291	

Recommendation (vii): School Forum are requested to note:

- (a) Approve the revised growth fund allocations for 2024/25
- (b) Approve to use the surplus of £276k to support falling rolls fund

Both items approved by the group.

4.8 **Falling Rolls Fund 2024/25**

- For the first time in 2024/25 the DfE allocated falling rolls fund to LAs as part of the growth fund. Falling rolls is distributed based on the reduction in pupil numbers between the October 2022 and October 2023 school censuses.
- The DfE states, “schools forum should agree the value of the fund and the criteria for allocation”. In 2024/25, we allocated a budget of £351k towards falling rolls. The qualifying criteria previously agreed by Schools Forum are:

- (a) The school must have a reduction of 10 or more pupils after adjusting for impact of bulge classes.
- (b) There must be a year-on-year reduction in delegated budget.
- (c) The school’s reserves do not exceed 8% of delegated budget.

Following request by members to amend the falling rolls criteria to ensure the funding is targeted to schools most in need and account for the impact of school size, Schools Forum is requested to approve a revised set of local criteria as follows:

- (a) Reduction of 2% or more in pupil numbers.
- (b) Only pay falling rolls above the 2% drop in pupil numbers.
- (c) Review rate annually to ensure affordability within cash envelope
- (d) There must be a year-on-year reduction in delegated budget.
- (e) The school’s reserves do not exceed 8% for primary schools and 5% for secondary schools delegated budget.

The table below shows falling rolls benchmarked criteria for neighbouring local authorities.

Falling Rolls Benchmarking information:

Local Authority	Folling Roll Criteria
Redbridge	1) Only payable when Falling Rolls is 80% of PAN (KS1,2,3). 2) Reserves threshold 6% Primary & 3% Secondary 3) Paid for 2 years & reviewed.
Waltham Forest	1) Only payable when Falling Rolls is 80% of PAN 2) Must be 5% lower between October censuses.
Enfield	1) Only payable if pupil numbers reduce by 10% or more between October censuses.

Barking & Dagenham	1) Only payable when there is a year-on-year reduction of 2%. 2) Reserves must be below 8% for Primary & 5% for Secondary. 3) There should be a year-on-year reduction in delegated budget.

- The above revised criteria will be implemented in 2025/26 if approved by members. The table below shows 2024/25 calculation using the old criteria. This will not be amended since schools have already budgeted to receive this funding pot.

Phase	School Name	Total NOR Oct 2022	Total NOR Oct 2023	Change in NOR increase/ (decrease)	Falling Rolls Fund £
Primary	Roding Primary School	1,055	1,003	-52	62,239
Primary	William Bellamy Primary School	909	861	-48	57,452
Primary	St Joseph's Catholic Primary School(Barking)	250	217	-33	39,498
Primary	Dorothy Barley Infants' School	259	234	-25	29,923
Primary	Manor Infants' School/Manor Longbridge	1,075	1,050	-25	29,923
Primary	Parsloes Primary School	372	349	-23	27,529
Primary	Valence Primary School	852	833	-19	22,741
Primary	Hunters Hall Primary School	588	571	-17	20,348
Primary	St Joseph's Catholic Primary School (Dagenham)	326	311	-15	17,954
Primary	Rose Lane Primary School	621	610	-11	13,166
Primary	The Leys Primary School	392	382	-10	11,969
Secondary	The Warren School	1,073	1,062	-11	18,581
	Falling Rolls requirement	7,772	7,483	-289	351,322
	Surplus on growth fund allocation				-276,291
	Falling rolls from reserve				75,031

Comments and discussions:

RL – commented on reviewing the rate annually to ensure affordability – would we be looking to tweak the percentage reduction threshold.

KA- responded, we pay full rolls, 40% of AWPU, for example if the AWPU is 5,000 then we will pay the falling rolls which will be around 2,000. If numbers dropped by 10 places for example you receive 10 x 2,000 that will be the falling rolls amount that would be received. We will review that rate annually i.e. 40% could be 35%.

RL- It wouldn't be reviewing the threshold by 2% it would be reducing the per pupil sum?

KA- confirmed this is correct.

LK – commented that there were 10 pupils before and the point we were making was that the large secondary there's a drop in 10 pupils rather than 10%. How did you come up with the 2%?

KA- responded, modelling has been undertaken behind the scenes with the percentage tweaking up to 10% and noticed that if we pick it at 2% it will have an impact on our primary schools and that is where the need is and enable our primary schools to be supported.

	<p>Recommendation (viii): Schools Forum are requested to:</p> <p>(a) Approve the revised falling rolls criteria to be implemented in 2025/25</p> <p>(b) Note falling rolls allocation for 2024/25 will not be impacted by the revised criteria</p> <p>Both items approved by the group.</p>																
5.0	<u>Any Other Business</u>																
	<p>JH – Martin Nicholson is stepping back in his current role of Chair of the High Needs Working Group for the time being. RL, SH, KA, MN and JH to discuss outside this meeting.</p>																
6.0	<p><u>Date of Next Meetings</u></p> <ul style="list-style-type: none"> Tuesday 21 January 2025 @ 10.00 am – via MS Teams 																
7.0	<p><u>Action Log</u></p> <p><u>No Action was recorded.</u></p> <table border="1" data-bbox="250 779 1383 1062"> <thead> <tr> <th data-bbox="250 779 391 856">No.</th> <th data-bbox="391 779 561 856">Date of Meeting</th> <th data-bbox="561 779 693 856">Item No</th> <th data-bbox="693 779 1291 856">Action</th> <th data-bbox="1291 779 1383 856">Owner</th> </tr> </thead> <tbody> <tr> <td data-bbox="250 856 391 968"></td> <td data-bbox="391 856 561 968"></td> <td data-bbox="561 856 693 968"></td> <td data-bbox="693 856 1291 968"></td> <td data-bbox="1291 856 1383 968"></td> </tr> <tr> <td data-bbox="250 968 391 1062"></td> <td data-bbox="391 968 561 1062"></td> <td data-bbox="561 968 693 1062"></td> <td data-bbox="693 968 1291 1062"></td> <td data-bbox="1291 968 1383 1062"></td> </tr> </tbody> </table>	No.	Date of Meeting	Item No	Action	Owner											
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