

Schools Forum Agenda

Thursday, 24 October 2024

4.30 pm – 6:30pm , Virtual - Microsoft Teams

For more information contact: janita.aubun@lewisham.gov.uk tel: 020 83147030

| Item | Pages |
|--|---------------|
| 1. Apologies and Acceptance of Apologies | |
| Welcome to new representative | |
| • Naheeda Maharasingam – new Primary School Headteacher representative. | |
| 2. Declaration of Interests | |
| 3. Minutes of the Meeting 27 June 2024 | 1 - 8 |
| 4. Matters Arising | |
| 5. Dedicated Schools Grant (DSG) 2023/24 Final and 2024/25 general funding Updates | 9 - 15 |
| The purpose of this report is provide and update on the 2023/24 final DSG position including decision on the use of a small surplus following the finalisation of the EY 2023/24 block. The report also provides update on the 2024/25 DSG plus some updates relating to the teachers pay and new grant to support the overall cost. | |
| 6. Early Years - Verbal Update | |
| Implementation of the EY national policy. | |
| 7. High Needs Block - Verbal Update | |
| Update on DBV and mitigation plan plus feedback from high needs working group (mainly relating to the continuation of the 5% pilot scheme). | |
| 8. Any Other Business | |

- **Notional SEN - training complete**
- **Heads mandatory training –**
Dates
 - Session 1 22/10/2024 Tuesday 14:00 - 16:00
 - Session 2 26/11/2024 Tuesday 10:00 - 12:00
 - Session 3 18/12/2024 Wednesday 10:30 - 12:30
 - Session 4 23/01/2025 Thursday 14:00 - 16:00
 - Session 5 25/02/2025 Tuesday 10:00 - 12:00

Future meetings

12 December 2024

16 January 2025 (provisional date, subject to DfE)

All meetings to be held 16.30 to 18.30, remotely.

Sub Group meetings

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| <p>High Needs Sub Group 28 November 2024 9 January 2025</p> |
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DRAFT

LEWISHAM SCHOOLS FORUM

Minutes of the meeting held on Thursday 27th June 2024

Membership (Quorum = 40% i.e. 7) ✓ = present x =absent a = apologies
 s = substitute

| | | Attendance | | | | |
|---|---------------------------------------|------------|-----------|-----------|-----------|---------------------|
| | | 19/ 10 | 14/ 12 | 18/ 01 | 27/ 06 | Date of Appointment |
| Primary School Headteachers | | | | | | |
| Manda George | Torridon Primary | ✓ | ✓ | ✓ | ✓ | Jan 2022 |
| Sharon Lynch | St William of York | ✓ | ✓ | ✓ | ✓ | Jan 2022 |
| Julie Loffstadt | Kilmorie | a | ✓ | ✓ | x | Jan 2022 |
| David Lucas | Trinity | ✓ | x | ✓ | ✓ | Feb 2024 |
| Maxine Osbaldeston | Launcelot | a | ✓ | ✓ | ✓ | Feb 2024 |
| Daniel Meyer | St. Bartholomews | | | | ✓ | Feb 2024 |
| Nursery School Headteacher | | | | | | |
| Cathryn Arnold-Kinsey | Clyde Nursery | ✓ | ✓ | ✓ | ✓ | Jan 2022 |
| Secondary School Headteachers | | | | | | |
| Michael Sullivan | Forest Hill | a | a | ✓ | ✓ | Oct 2022 |
| Special School Headteacher | | | | | | |
| Katie Denton | Greenvale | | | ✓ | ✓ | Jan 2024 |
| Pupil Referral Unit Headteacher | | | | | | |
| Heather Johnston | Abbey Manor | ✓ | ✓ | ✓ | ✓ | Jan 2023 |
| Primary School Governors | | | | | | |
| Peter Fidel | Eliot Bank and Gordonbrock Federation | ✓ | ✓ | ✓ | ✓ | June 2021 |
| Secondary & Special School Governors | | | | | | |
| Academies | | | | | | |
| Niall Hand | ACADEMY | | | | ✓ | June 2024 |
| Ann Butcher | Childeric | x | ✓ | x | x | June 2021 |

| | | | | | | |
|-----------------------------|---|---|---|---|---|-----------|
| 14-19 Consortium Rep | | | | | | |
| Jamie Stevenson | Lewisham College | a | ✓ | a | x | Oct 2023 |
| Early Years – PVI | | | | | | |
| Melanie Simpson | The Village Montessori | x | ✓ | ✓ | ✓ | Jan 2023 |
| Diocesan Authorities | | | | | | |
| Yvonne Epale | Education Commission – Catholic Diocese of Southwark | ✓ | x | ✓ | ✓ | June 2024 |
| Sarah Ambrose | Southwark Diocesan Board of Education (Church of England) | | | | ✓ | June 2024 |
| SUBSTITUTE | | | | | | |
| 14-19 Consortium | | | | | | |
| Jayne Morgan | Lewisham College | | | s | s | |

| | | |
|---|------------------------|--|
| | | |
| Observers/Others in attendance | | |
| Strategic Business Partner | Mala Dadlani | |
| LB Lewisham - Finance | Lurenco Reynolds-Moxam | |
| LB Lewisham – Head of Lewisham Learning | Anthony Doudle | |
| LB Lewisham – Head of Early Years | Nikki Sealy | |
| LB Lewisham - SEND | Clare Gurbutt | |
| NEU | James Kerr | |
| Clerk | Janita Aubun | |
| | | |
| | | |

1. Apologies and Acceptance of Apologies/ Welcome new members/Member Resignations

Apologies of Absence for Angela Scattergood and Reinhild Onuoha

Forum welcomed: -

- Sarah Ambrose (newly elected Southwark Diocesan Board of Education (CE) representative),
- Niall Hand (recast as Academy representative) and Yvonne Epale, (Education Commission-Catholic Diocese of Southwark), re-elected.

Completion of Term

Farewell and thank you given to Peter Fidel, (Primary Governor) and Ann Butcher, (Academies), both terms of office finish June 2024.

Retirement - Sharon Lynch (Primary Head Representative)

Resignation:- Julie Loffstadt (Primary Representative)

2. Declaration of Interests

There were no declarations of interest.

3. Minutes of the Meeting – 18th January 2024

Minutes were agreed as accurate and a true representation.

4. Matters Arising

Cost of living crisis – to lobby at national level. Agreed to remain on the agenda for review until we receive more clarity on next year's funding allocation and pay review, post parliamentary election.

Mandatory training for all headteachers – to be arranged in Autumn.

However notional SEN briefings have been arranged for 2nd & 9th July. 11 – 12.30 and 2 – 3.30pm respectively. Headteachers can attend either. Additionally, an in person, larger training session arranged for 16th October – venue to be confirmed.

5. Schools Forum Workplan 2024/25

- Forum were provided with a workplan for 2024/25 financial year.
- Recognised that there will be standing items i.e. Early Years policy changes, Funding updates and High Needs block as well as (DBV), delivering better value.
- Forum also noted the dates of the meetings 2024/25.

No objections or comments were raised.

Agreed: -

- The Workplan was approved.

6. Proposed De-delegation for Lewisham Learning (School Improvement) 2024/25.

Recommendation:-

- Additional £40k requested by schools forum to fund the TRIIE project
- Paper to come back to Forum in the autumn term to consider 2025/26 funding arrangements for Lewisham Learning

Vice Chair raised a question around spending and collective buying power, and asked for any examples of where this has happened or worked effectively. Discussions will need to be had with the academies to design cost effective packages.

Discussions about future thinking and forward planning in terms of multi academy trusts and looking at pupil numbers where fewer schools are potentially paying in to Lewisham Learning. To look at options going forward and costings, including potential SLAs. Also to include Early Years and Special Schools.

- 7 members (primary & secondary sector eligible only), voted in agreement to support the Lewisham Learning partnership by funding an additional £40K for 2024/25 to deliver the TRIIE project and to maintain the current level of de-delegated funding. There were no abstentions. Vote carried.
- Further report to come back to Forum in either October or December to consider the 2025/26 funding arrangements and include the considerations as stated above by vice chair.

7. Update on Early Years

Slides were shared with Forum which summarised the work the team have been doing following the expansion of the early years entitlements and introduction of the national wraparound childcare programme. Also summarised the associated funding the authority will receive e.g. Wraparound Childcare Programme Costs 2023-2026, Capital Funding etc.

Forum informed that the 1st milestone has been implemented i.e. the 2-year-old working family's entitlement for the beginning of April 2024. Team have successfully recruited 3 new officers to the service to work on this development programme and delivery plan.

E/Y Team are also preparing for the implementation of the Under 2's offer for start of September 2024. Offers currently stands @ 15 hours; from September 2025 will move to a 30 hour offer.

- Forum noted the contents of the presentation and the Head of Early Years was thanked for her hard work in developing the programme.

8. Verbal Update on High Needs Block

Slides presented and Forum were informed of the following:-

- Slower growth in the number of EHCPs since 2023 – LA more robust in decision making.
- 68.7% EHCPs are in Lewisham schools (an increase). This is above the KPI.
- Compliance rate is still an issue across all partnerships.
- All new resource bases in primary schools are now live – Launcelot is the last to be rolled out. Are looking to create a small secondary school resource base to include ASD.
- Improved proportion of SLD pupils going to local FE colleges this September.

DBV (Delivering Better Value)

- Forum were made aware that the grant award letter was received late from the DfE, i.e. in May 2024. There is therefore added pressure.
- Work streams have been put forward and the bulk of the work will commence September 2024 to be delivered during 2024/25 academic year.

Notional SEN Budget/ SEN Support Funding for our settings

Officers mentioned a disparity between colleagues who knew the purpose of the notional SEN and the value of it. Consequently, two online sessions will be held with Headteachers on Notional SEN funding. 2nd July and 9th July followed by an in person, larger session, on 16th October.

Additional Funding for Schools with more than 5% of learners with EHCP

Aim is to encourage more inclusive practice, and this remains a pilot for 2024/25.

Schools forum to note that it has been agreed with HNSG that the 0.5% (max) contribution from Schools Block will be used as the maximum payable as part of this initiative.

Forum to note that the 2023/24 method included pupil in Resource Base -DfE has advised this is not correct and is in effect double funding.

Forum was asked to consider on which basis the allocation should be made.

Proposed that October census be used following discussions with working group. Using a termly census instead, could create a level of instability in schools and the budget would have to be recast every term. Termly casting would mean varying funding amounts each term.

Forum members discussed the matter –it was agreed a further meeting of the high needs working group would be held ensuring that head of SEN was present and also representative from EY (schools and LA).

Outcome to be advised at the next meeting.

Agreed:-

- Decision cannot be made based on the current options. Pilot may need to be re-shaped.
- High Needs Sub Group to reconvene urgently. Early Years sector to be invited to this meeting. Head of the data team to be invited also, as well as Nikki Sealy (Head of Early Years).

9. DSG 2023/24 Outturn (including Schools Balances Position) and DSG 2024/25 Funding Update

Report was presented to Forum to provide a final position for 2023/24 including the overall position

The report also provided an update on the 2024/25 DSG.

Recommendation:-

Schools Forum was asked to note the contents of this report with particular focus on:

- the continuing pressure on the DSG – High Needs Block
- surplus balance position for schools – 2023/24 surpluses have reduced from 2022/23 and the deficits have increased.
- Schools with extreme levels of surplus, the use of these needs to be carefully managed. Schools should work towards 5% in reserves and 2 – 3% in year contingency.
- Provisional Schools Block position- noting a further report to forum once we have confirmation of the 2023/24 EY pupil validation and associated finances.
- Recognising the ongoing pressure on the High Needs Block.
- Provisional EY block:- will require updating post validation of the 2023/24 pupil data . Revision still awaited with regards the under 2 year old cohort which at present carries a level of risk.

- Schools In Financial Difficulty (schools supported with one off funding) - all 20 schools have to undertake a SRMA visit; some already have. SRMA visits are not restricted to schools in deficit. (preventative support)

Agreed:-

- Schools Forum noted the contents of the report.
- In relation to the Early Years block, a paper is to be brought to Forum once the final E/Y position is known.

10. Any Other Business

PFI Factor

Forum informed that the DfE have asked Lewisham for further details of the sinking fund. (This is a debt financing model). Grant Thornton originally revisited our submission. Officers have a meeting with the DfE tomorrow in regards to this. Forum made aware that this meeting may influence the PFI Factor and is a potential risk to the funding we receive.

Thank you

Chair thanked Sharon Lynch for all of her contribution to Forum and wished a very happy retirement on behalf of members.

Chair further extended her thanks for all their hard work to Schools Forum -

- Peter Fidel, (Primary Governor) and Ann Butcher, (Academies), both terms of office finish June 2024.
- Julie Loffstadt (Primary Representative) Resignation

Future Meetings

24 October 2024

12 December 2024

16 January 2025 (provisional date)

All Schools Forum meetings will continue to be held between 16:30-18:30 and remain virtual, unless advised otherwise.

Sub Group meetings

| |
|------------------------------------|
| <u>High Needs Sub Group</u> |
| 10 October 2024 |
| 28 November 2024 |
| 9 January 2025 |

Schools Forum Action Summary

| Item | Action to be taken | Officer(s) responsible | Outcome/Current position |
|---|--|--|--|
| <p>Matters Arising – Schools Forum 14 December 2023, Schools Forum 18 January 2024 & Schools Forum 27 June 2024</p> <p>Matters Arising - Schools Forum 14 December 2023, Schools Forum 18 January 2024 & Schools Forum 27 June 2024</p> | <p>Cost of living crisis - to lobby at National Level. Letter to be drafted for forum approval, making representation to the DfE/Secretary of State regarding the 2024/25 funding allocation error.</p> <p>Mandatory training for ALL headteachers</p> | <p>Chair</p> <p>Mala Dadlani</p> | <p>Position remains for review.</p> <p>Pending – to be arranged Autumn term.</p> |
| <p>6 – Proposed De-delegation for Lewisham Learning (School Improvement) 2024/25 – Schools Forum 27 June 2024</p> | <p>Discuss with Schools Forum the support provided to schools through Lewisham Learning.</p> | <p>Anthony Doudle</p> | <p>Paper to come back to Forum October/December 2024 to consider 2025/26 funding arrangements.</p> |
| <p>6 – Dedicated Schools Grant 2024/25 – Schools Forum 14 December 2023, Schools Forum 18 January 2024.</p> <p>8 – Verbal Update on High Needs Block – Schools Forum 27 June 2024</p> | <p>Notional SEN Training</p> | <p>Mala Dadlani</p> | <p>July sessions completed. Further in person session arranged for 16th October 2024</p> |
| <p>8 – Verbal Update on High Needs Block – Schools Forum 27 June 2024</p> | <p>Additional Funding for Schools in Deficit.</p> | <p>HNSG, including Catherine Kinsey, Nikki Sealy & Head of Data Team</p> | <p>High Needs Sub Group (HNSG) to reconvene urgently.</p> |
| <p>9 - DSG 2023/24 Outturn (including Schools Balances Position) and DSG 2024/25 Funding</p> | <p>Provisional Early Years Block position</p> | <p>Mala Dadlani</p> | <p>Report is to be brought to Forum once the final 2023/24 E/Y position is known.</p> |

| | | | |
|---|--|---|-------------------------------|
| Update – Schools Forum 27 June 2024 | | | |
| 8 – Revision of Membership of Schools Forum. Schools Forum 18 January 2024 | <p>Appropriate representatives to go back to their voting sectors and nominate.</p> <p>To inform Primary Heads consultative lead and liaise with Lead officer on any Governor Vacancies.</p> | <p>As appropriate</p> <p>Clerk – Janita Aubun</p> | <p>Ongoing</p> <p>Ongoing</p> |



Schools Forum

Report title: Dedicated schools grant (DSG) 2023/24 final, 2024/25 update

Date: 24th October 2024

Key decision: No.

Item number 5

Outline and recommendations

2023/24 DSG revised outturn position following finalisation of the Early Years (EY) pupil number data

- Schools forum to note final position with regards the 2023/24 position
- To note following validation process:
 1. Of the £1.4m £1m value of clawback, value of funds that can be maintained by LA £0.4m,
 2. funding implications of the EY supplementary Grant (2023/24), £155k
 3. request for balance to support the High Needs Block (HNB) recognising the pressure on the HNB £255k
- **Note the 2024/25 DSG position** updated from December 2023, initial allocation for:
 - schools block - recoument by Education and Skills Funding Agency (ESFA) to fund recent converter academy schools directly.
 - updated EY funding, following validation of the January pupil count.
- Note the confirmation of the teachers' pay award at 5.5% and supporting grant, with the expectation that 1.2% is met by schools directly. Each school will be affected variably depending on their teaching costs and how they confirm with the methodology.
- Note that advised by DfE changes per se expected with exception of PFI. Funding update for 2025/26 will be headlines in mid November and final allocations in late December.
- June 2024 budget plans submitted by schools - initial feedback for Schools Forum to note.

Timeline of engagement and decision-making

Decisions for school's forum:-

- Agree the use of the £400k funding remaining from the Early Years (EY) block post the 2023/24 data validation to fund the clawback of the Early Years Grant of £155k, and agree to transfer the remaining £245k to support the overspend on the high needs block.

Remainder of the report is for information.

1. Summary

- 1.1. The purpose of this report is to update schools forum on various financial information including:

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- 2023/24 Dedicated Schools Grant (DSG) final outturn following data validation.
- 2024/25 updated DSG (July 2024) and projected outturn.
- Update on Pay Awards and associated supported funding.

2. DSG 2023/24 final position

2.1. Schools Forum will be aware that the DSG position for 2023/24 remained provisional pending the finalisation of the Early Years (EY) Data (January 2024). We have now received the DSG final position and can confirm as per table 1 below.

Table 1

| 2023/24 | Schools Block | Central School Services Block | High Needs Block | Early Years Block | Total DSG Allocation |
|---------------------------|---------------|-------------------------------|------------------|-------------------|----------------------|
| | £m | £m | £m | £m | £m |
| Total Lewisham Allocation | 231.0 | 3.3 | 76.9 | 23.8 | 335.0 |
| Less ESFA adjustments | -52.6 | 0.0 | -0.4 | 0.0 | -53.1 |
| Total Cash Allocation | 178.4 | 3.3 | 76.4 | 23.8 | 282.0 |
| Expenditure | -177.7 | -4.7 | -79.6 | -23.4 | -285.4 |
| Transfers | -0.7 | | 0.7 | | 0.0 |
| Met from General Fund | | 1.4 | | | 1.4 |
| Net position | 0.0 | 0.0 | -2.5 | 0.4 | -2.0 |

2.2. The table above notes the following

- Schools Block shows as balanced for 2023/24.
- Central School Services Block (SSSB) supplemented from Council resources
- High Needs Block shows an overspend of circa £2.5m. This will add to the overall position and now shows a cumulative position of £15.5mm (assuming 2024/25 concludes with a £2.4m overspend that will rise to £18m).
- Early Years Block- following the finalisation of the data validation exercise, the funding to the LA has been reduced by £1.03m.

Table 2 EY Block

| LA Number | LA Name | Adjustment | | | | | | Total |
|-----------|----------|---|--|--------------------------------------|----------------------------|---|---|-------------|
| | | Universal 3-4 year old entitlement funding | Additional 3-4 year old funding for working parents | TWO-YEAR-OLD ALLOCATIONS | EYPP | SUPPLEMENTARY DEDICATED SCHOOLS GRANT FUNDING FOR 3-4 YEAR OLDS FOR | | |
| | | Amount LA allocated for universal 3-4 year old entitlement funding for the first year | Amount LA allocated for additional hours for 3-4 year olds | Total funding to LAs for 2-year-olds | Early Years' Pupil Premium | Disability Access Fund | Maintained nursery school supplementary funding | |
| 209 | Lewisham | -£564,595 | -£218,002 | -£252,769 | £10,655 | £0 | -£5,950 | -£1,030,661 |

2.3. This reflects reduction in numbers and leaves circa £400k.

2.4. Unfortunately, the DfE has advised that the Early Years Supplementary Grant would also require adjustment with a consequence of further clawback from the Local Authority of £155k (table 2 below). Please see table below showing the extra from DfE remittance slip. Schools forum is asked to approve the use of £155k from the £400k, leaving a £245k balance.

Schools forum is requested to approve the transfer of £245k to support the High Needs Block in 2024/25. It should be noted that the funding previously agreed of circa £600k will be used to support those schools with higher than average EHCP so effectively is being returned to schools.

Table 3

| UKPRN | Total Recovery / Payment | LA No | LA Name | Message to Recipient (Remittance advice) |
|----------|--------------------------|-------|----------|--|
| 10003895 | -£154,624.00 | 209 | Lewisham | FY23/24 EYSG adjustment |

3. DSG 2024/25

3.1. Table 4 below shows the revised funding allocation for Lewisham.

3.2. The table shows the adjustment for academy recoupment – effectively the DfE/ESFA will hold back funds to enable funding for Lewisham schools that are Academies. The EY block remains provisional pending the January 2025 pupil validation exercise. The EY block has however been revised following on from the January 2024 Census return (initially set at £41.m).

Table 4

| 2024/25 | Schools Block | Central School Services Block | High Needs Block | Early Years Block | Total DSG Allocation |
|---------------------------|---------------|-------------------------------|------------------|-------------------|----------------------|
| | £m | £m | £m | £m | £m |
| Total Lewisham Allocation | 240.7 | 3.0 | 79.0 | 38.9 | 361.6 |
| Less ESFA adjustments | -89.1 | 0.0 | -0.7 | 0.0 | -89.8 |
| Total Cash Allocation | 151.6 | 3.0 | 78.3 | 38.9 | 271.8 |
| Expenditure | -151.0 | -4.7 | -81.4 | -38.9 | -276.0 |
| Transfers | -0.6 | | 0.6 | | 0.0 |

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|-----------------------|-----|-----|------|-----|------|
| Met from GF | | 1.7 | | | 1.7 |
| Net position forecast | 0.0 | 0.0 | -2.5 | 0.0 | -2.5 |

3.3. Following on from above the revised budgets within EY, this position now stands provisionally as shown in table 5 below. It should be noted that the EY block is likely to have further adjustments, potentially linked to the under 2s offer and appropriate census return updates.

Table 5

| Description | | £m |
|--|---------|-------|
| 3 and 4 year old hourly rate | 87.05% | 20.01 |
| SENif | 2.69% | 1.65 |
| Deprivation | 3.63% | 0.84 |
| Contingency | 1.74% | 0.63 |
| Early Years Quality and Sufficiency Team | 4.90% | 1.88 |
| | | |
| Formula Driven Element 3 and 4 year old | 100.00% | 25.00 |
| | | |
| Disability Access Funding | | 0.18 |
| Early Years Pupil Premium | | 0.18 |
| Nursery Schools Supplementary Funding | | 0.48 |
| 2 year old entitlement | | 13.06 |
| Total Provisional Early Years Block | | 38.90 |

4. Teachers Pay Offer

4.1. Schools forum will be aware that shortly after the end of the summer term, the DfE announced agreement towards a 5.5% uplift for all teaching staff. At the time of the announcement the DfE also noted that it would be supported by specific funding – to this end a new grant has been announced. Full details can be found in the following link:

[Core schools budget grant \(CSBG\) 2024 to 2025 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/core-schools-budget-grant-2024-to-2025)

4.2. The schools specific information has now been received and the schools funding tool is updated accordingly.

4.3. Based on the guidance we anticipate the funding rates outlined below

| Primary and Secondary | National | Lewisham ACA | Lewisham Figure |
|-----------------------|----------|--------------|-----------------|
| | £ | £ | £ |
| Primary | 76 | 1.187 | 90.19 |
| KS3 | 108 | 1.187 | 128.16 |
| KS4 | 122 | 1.187 | 144.77 |
| Lump Sum | 2900 | 1.187 | 3441.31 |
| FSM 6 Primary | 70 | 1.187 | 83.07 |
| FSM 6 Secondary | 100 | 1.187 | 118.67 |

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|------------------------|------------|--------------|---------------|
| Special Schools | 610 | 1.212 | 739.06 |
|------------------------|------------|--------------|---------------|

- 4.4. It should be further noted that the funding is for seven months, reflecting the September to March position. It is highly likely that the funding for 2025/26 will be rolled into the main DSG.
- 4.5. It should be noted that any funding can only be assumed as a contribution to the overall increase in teaching costs. Whilst the DfE suggests this is fully funded, the pay review body suggested that the initial 1.2% can be met from schools' budgets. Therefore there is possibly 4.3% support. Again, funding for individual schools will vary depending on their level of staffing and what 5.5% means for each school. Those with high staffing costs will naturally have a lower contribution from the grant. For those schools that do have a balance remaining, that can be used to support some of the support staff costs.
- 4.6. Funding for EY is based on the EY funding formula (localised to allow for floors and ceilings). The DfE has noted for Lewisham an increase of 11p (6p if adjusted for 7 months) for all providers with EY settings, and 57p (33p if adjusted for 7 months) for the nursery schools. The expectation is a total £233k.
- 4.7. It should be noted that there remains a level of ambiguity if the funding for mainstream schools is indeed 7 months as the main CSBG appears to be 7 months advised – the EY grant is demonstrated at annual then pro-rated down.

5. Other Grants and 2025/26 DSG

- 5.1. At the time of writing, DfE has confirmed that headline information will be known post autumn budget statement (likely Mid November), however the final detailed information will not be known until December. DfE has also confirmed no significant changes to overall formula with the exception of PFI – which the DfE is currently in engagement with Local Authorities.
- 5.2. Normally by now, the DfE would have announced provisional 2025/26 DSG uplift.

6. June Budget Plans 2024/2025 to 2026/27

- 6.1 Schools Finance has now received all the budget plans from schools. The Governing Body of each school has now been sent a letter confirming the health check of each school. The point of concern is the number of schools who are suggesting their inability to set a balanced three year budget. The main challenge here is difficulty in understanding how realistic the budgets are. Currently 35 schools are suggesting a deficit at the end of the 3 year period. At the end of 2023/24 we have 24 schools in deficit.
- 6.2 Going forward to strengthen support to schools, Lewisham will be inviting those schools with the highest risk to engage with a panel consisting of Director for Education, Head of Lewisham Learning, Head of Finance and HR.

7. Financial implications

- 7.1. There are no direct financial implications arising from this report. The report does however recognise the reduction in the EY block funding as an outcome of the pupil validation exercise and the knock on effect.
- 7.2. The report recognises that after clawback there remains circa £400k and schools forum is asked to agree that £155k of this funding is used to support the shortfall from the Early Years Supplementary Grant.
- 7.3. Balance is transferred to support the ongoing pressure on the high needs block (£245k) recognising the pressure arising from support under 5's.
- 7.4. The report also notes the increasing number of schools suggesting they are not able to set a three year balanced budget. The report notes the strengthening of process by Lewisham to support these schools. Governing Bodies are required by the DfE to set a balanced budget position. Whilst many schools are undertaking preventative action, many are not taking advantage of the longer term planning to prevent doing into deficit. The report also noted schools with deficits – Lewisham Council is currently engaging with the schools to ensure robust Deficit Recovery Plans are in process.

8. Legal implications

- 8.1. There are no specific legal implication arising at this stage. It is to be noted that local authorities are obliged to publish annually a statement setting out details of its planned schools budget and other expenditure on children's services, showing the amounts to be centrally retained and funding delegated to schools, and after each financial year to publish a statement showing outturn expenditure.

9. Equalities implications

- 9.1. At this stage there are no direct implications arising from this report. Equalities impact will need to be considered as the Council/ schools progresses options towards mitigating an overspend position in the associated budgets.

10. Climate change and environmental implications

- 10.1. Not applicable

11. Crime and disorder implications

- 11.1 Not applicable

12. Health and wellbeing implications

- 12.1 Not applicable

Report author and contact

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