

# Schools Forum Agenda

Thursday, 18 January 2024  
4.30 pm – 6.30pm, Virtual - Microsoft Teams

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Item	Pages
1. <b>Apologies and Acceptance of Apologies</b>	
2. <b>Declaration of Interests</b>	
3. <b>Minutes of the Meeting 14 December 2023</b>	1 - 6
4. <b>Matters Arising</b>	
5. <b>Dedicated Schools Grant (DSG) 2024/25 - Funding Settlement</b>	7 - 17
<p>First of four reports. The purpose of this report is to provide schools forum with details of the overall DSG funding settlement for 2024/25, and any updates on other grants.</p>	
6. <b>Dedicated Schools Grant 2024/25 - Schools Block Submission of the Authority Proforma Tool (APT)</b>	18 - 31
<p>This is the second of four reports. The purpose of this report is to consider options for finalising the APT submission to the DfE on the 22<sup>nd</sup> January 2024.</p> <p>This report also requires Schools Forum to consider and agree the levels of de-delegation for 2024/25.</p>	
7. <b>Dedicated Schools Grant (DSG) 2024/25 - Early Years Block</b>	32 - 45
<p>This is the third of four reports. This report details the funding associated with the delivery of the Early Years Agenda, which is currently being extended in line with DfE policy changes.</p> <p>The report will be supplemented by a verbal update from the Head of Early Years as to the implementation and support of the national policy.</p>	

**8. Dedicated Schools Grant (DSG) 2024/25 - High Needs Block 46 - 55**

This is the fourth of four reports and focuses on the High Needs Block. The report provides detail around the funding but also supporting data on SEN needs.

The report will be supplemented by a presentation which focuses on feedback from the High Needs Working group, including the DBV submission.

**9. Revision of Membership of Schools Forum 56 - 59**

Purpose of this report is to note the change in membership arising from the recasting following the academisation of six schools.

Action for representatives to agree nominations.

**10. Any Other Business**

**Future meetings**

2024/25 dates tbc

All meetings to be held 16.30 to 18.30, remotely.

**Sub Group meetings**

<b>High Needs Sub Group</b>
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Dates tbc
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# DRAFT

**LEWISHAM SCHOOLS FORUM**

*Minutes of the meeting held on Thursday 14th December 2023*

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

		Attendance				
Primary School Headteachers		01/ 02	29/ 06	19/ 10	14/ 12	Date of Appointment
Manda George	Torridon Primary	a	✓	✓	✓	Jan 2022
Sharon Lynch	St William of York	✕	✓	✓	✓	Jan 2022
Julie Loffstadt	Kilmorie	✓	✓	a	✓	Jan 2022
David Lucas	Trinity	✓	✓	✓	x	Jan 2021
Maxine Osbaldeston	Launcelot	✕	✓	a	✓	Jan 2021
VACANT	PRIMARY SCHOOL					
VACANT	PRIMARY SCHOOL					
Nursery School Headteacher						
Cathryn Arnold-Kinsey	Clyde Nursery	✓	✓	✓	✓	Jan 2022
Secondary School Headteachers						
Naill Hand	Prendergast Ladywell	✓	✓	✓	✓	Oct 2022
Michael Sullivan	Forest Hill	✓	✓	a	a	Oct 2022
Special School Headteacher						
VACANT	SPECIAL SCHOOL					
Pupil Referral Unit Headteacher						
Heather Johnston	Abbey Manor	✓	✓	✓	✓	Jan 2023
Primary School Governors						
Daniel Meyer	St Bartholomews	✓	✓	a	x	Jan 2022
Peter Fidel	Eliot Bank and Gordonbrock Federation	✓	✓	✓	✓	June 2021
Secondary & Special School Governors						

Pat Barber	Bonus Pastor	✓	a	✓	a	Jan 2022
Andy Rothery	Leathersellers Federation	✓	✓	✓	✓	June 2021
VACANT	SPECIAL SCHOOL					
<b>Academies</b>						
VACANT	ACADEMY					
Ann Butcher	Childeric	✓	✓	✗	✓	June 2021
<b>14-19 Consortium Rep</b>						
Jamie Stevenson	Lewisham College			a	✓	Oct 2023
<b>Early Years – PVI</b>						
Melanie Simpson	The Village Montessori	a	✓	✗	✓	Jan 2023
<b>Diocesan Authorities</b>						
VACANT	Southwark Diocesan Board of Education (Church of England)					
Yvonne Epale	Education Commission – Catholic Diocese of Southwark	a	✗	✓	x	May 2021

<b>Observers/Others in attendance</b>		
Strategic Business Partner	Mala Dadlani	
LB Lewisham - Finance	Lurenco Reynolds-Moxam	
LB Lewisham - Finance	Floyd Roberts	
LB Lewisham – Head of Early Years	Nikki Sealy	
LB Lewisham - SEND	Reinhild Onuoha	
Lewisham Learning	Anthony Doudle	<b>apologies</b>
Unison	Justine Canady	
NEU	James Kerr	
Clerk	Janita Aubun	

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

Apologies accepted from Pat Barber (Secondary Governor) and Michael Sullivan (Secondary Headteacher). Apologies also received from Anthony Doudle – LB Lewisham Learning.

### 2. Declaration of Interests

No declarations of interest.

### 3. Election of Vice-Chair

Forum Chair invited nominations for the vacant position of Vice-Chair. 1 nomination received – Niall Hand (Secondary Head). No objections hence Niall elected as Forum Vice-Chair, commencing immediately. Niall was given thanks for his support to Forum – a great asset.

#### **4. Minutes of the Meeting – 19<sup>th</sup> October 2023**

Questions and comments invited. Minutes agreed as accurate.

#### **5. Matters Arising**

Drafting of the letter to the Secretary of State regarding 2024/25 DfE funding allocation error – this is to be postponed and put on hold for the time being. Position to be reviewed following year-end i.e. post March 2024

Schools Forum training for new headteachers - postponed until New Year.

PFI factor consultation with schools - outcome - thank you to Niall Hand for co-ordinating and leading on this work.

Revision of Schools Forum membership - For consideration at the January meeting following finalisation of Census Data.

#### **6. Dedicated Schools Grant 2024/25**

Forum informed that next week (circa 20<sup>th</sup> December), we will receive the funding settlement. Officers will undertake detailed review including the submission of the APT tool.

Key purpose of this meeting is to agree the principles under which the APT should be produced.

Mala noted the following, which forum members supported:-

Agreed –

- The Lewisham Funding formula submission will be based on the NFF (i.e. The values in full for each allowable factor)
- Including changes previously advised and appropriate implementation - in particular relating to split sites.
- Exceptional Factors – There are currently two exceptional factors that form part of the Lewisham funding formula. Schools' forum will be aware that the exceptional factor relate to
  - Playing Fields Managed by Bonus Pastor circa £166.9k and Service Charge payment for St Michaels of £23.5k
  - Schools Forum will recall that for 2023/24, DfE agreed to the disapplication requests and advised an annual disapplication request was not required. However, this position changed with the focus on the hard formula. The DfE has now advised Lewisham that a disapplication would be required for 2024/25. This has been submitted to the DfE on the basis that schools forum continue to support the request. Schools forum agreed to the submission of the disapplication requests.
  - Schools Forum to further note that at present, we await a decision from DfE on the disapplication which therefore remains a risk -both schools are made aware.
  - Agree any growth funding be included on the APT tool, to determine amount in the Growth Fund Budget to fund incremental support for bulge class and

potentially any unplanned in-year growth/bulges. In the event that the funds are not required; any unused funds, to be held in the Growth Fund for future use.

- De-delegation to be in line with the current basis plus inflation (where appropriate) as detailed in the report. noted that de-delegation can only apply to maintained schools. Lewisham has 6 schools converting over the course of the next 6 months, so there will be a likely impact on the value of de-delegation.

Schools Forum noted the DfE position of MFG between 0 to 0.5%. further agreed that Officers would provide 3 options for consideration subject to affordability.

- Option one- MFG uplift be set at max 0.5%, with any residue to support pressures in HNB.
- Option two- 0.5% transfer from Schools Block, followed by MFG set at affordability (likely to be near 0%) , assuming this complies with the 0.% MFG (as minimum)
- Option three- depending on the financial settlement, it may be necessary to provide a hybrid model of options one and two. Forum to recognise the ongoing pressure on the HNB and to further note the joint responsibility of managing DSG.
- PFI -confirmation of 20% lump sum and 80% targeted.
- Continuation of financial risk associated with High Needs (demand led), Early Year (EY) (numbers accessing free entitlement), pressure on schools arising from economic challenges and national policy.
- Schools' forum also asked to note and agree to receive further updates as more information is made available at the January meeting and the Summer meeting.

Forum advised of typo in paragraph 5.2 of the report. 3.88% uplift should read 5%.

## **7. Application of the Quality Factor of Early Years Funding Block 2023/24**

Following on from the 19<sup>th</sup> October Schools Forum, members were presented with a fourth option (additional option as requested by the nursery schools sector), to take into consideration maintained nursery schools employing a greater number of qualified teachers than nursery classes in primary schools or PVI's. Schools forum agreed the use of the 4<sup>th</sup> option for allocation of the quality factor.

Forum was reminded that this funding is that which was streamlined into the DSG in the beginning of the year; not to be confused with the Teachers Pay Award nor the TPAG for 2023/24

### Outcome: -

- 11 members voted in agreement for Option 4, i.e. majority vote carried.

## **8. Additional Funding for Schools in Deficit**

This report looked at a potential criteria on which to allocate this one-off funding to support maintained schools in financial difficulty. Maintained schools does also include nursery schools and special schools.

Forum noted the report.

- Agreed to have a final outcomes report to forum for scrutiny with headlines – not likely for January 2024 meeting though. Head of Lewisham Learning to lead on this process with applicable schools approached to draft short business case. Trade off between having an over complex allocation method, recognising this is one off funding. Funding should not be used to build reserves.

## 9. High Needs Block

Verbal update by Head of Integrated SEND Services for Children & Young People. Slide presentation which is to be shared with members, following the meeting. Forum updated on the grant submission to the DfE for potential £1M to support actions anticipated to support the reduction of cost to the HNB.

Forum noted the following:-

- Grant application to be submitted by 21.12.23 following extension (due to ILACS inspection)
- Verification and Quality Assurance by Newton – programme to end Dec 23/ early Jan 24.
- DfE SEND Advisor and Vulnerable Children's Unit Representatives as well as CIPFA reviewing grant application, deficit management plan and evidence- continues verification process.
- Outcome of grant application communicated - March 2024, LA will have 18 months to effectively use this funding in line with agreed implementation plan.
- Delivery of the DBV Implementation Programme commenced fully at the start of the academic year (September 2024), with clear milestones set for monitoring purposes.
- Summary position to be brought to the January forum; bid has just been concluded today.
- Detailed discussions took place with the Schools forum High needs working group throughout the process – with headlines presented to forum.

Schools forum to further note that the benefits of the Lewisham mitigation plan as progressed with Schools forum is working well and beginning to show evidence of reduction in cost mainly arising from the revision of Lewisham based special needs provision (expansions and resource bases). Work is also continuing with external providers around fee negotiations.

## 10. Any Other Business

None.

### Future Meetings

18 January 2024 (provisional date, subject to DfE)

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

**Schools Forum Action Summary**

<b>Item</b>	<b>Action to be taken</b>	<b>Officer(s) responsible</b>	<b>Outcome/Current position</b>
<b>Matters Arising - Schools Forum 14 December 2023</b>	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.	Chair	Position to be reviewed following year-end i.e. post March 2024.
<b>Training for ALL Headteachers</b>	Mandatory training	Mala Dadlani	Postponed till New Year.
<b>6 - Dedicated Schools Grant 2024/25 – Schools Forum 14 December 2023</b>	Notional SEN	Mala Dadlani	Working Groups requested a series of training sessions for schools to better understand notional SEN.
<b>8 - Additional Funding for Schools in Deficit - Schools Forum 14 December 2023</b>	Final outcomes report to forum for scrutiny with headlines.	Anthony Doudle	Engagement with schools in January – feedback to school at Forum meeting in Summer.
<b>9 – High Needs Block– Schools Forum 14 December 2023</b>	Grant Application - headlines of the final submission to be presented to forum in Jan.	Reinhild Onuoha	For January 2024 Forum.





## Schools Forum

**Report title: Dedicated Schools Grant (DSG) 2024/25 Funding Settlement**

Report 1 of 4

**Date:** 18 January 2024

**Key decision:** No

**Item no:** 5

## Outline and recommendations

This report provides Schools Forum with headline information regarding the Dedicated Schools Grant (DSG) funding settlement.

For each sub block of the DSG (Schools, Central Services to Schools, High Needs and Early Years) there are separate reports discussing the detail of the financial settlement and the application of the funding for Lewisham.

Schools Forum is asked to note this report, which sets the financial context for the sub reports which are part of this agenda.

## Timeline of engagement and decision-making

This report is for information only and sets context for the associated reports. Any appropriate engagement or decision making will form part of the detailed reports specific to each funding block.

## Purpose of Report

- 1.1. This report provides schools forum with the summary position of the Dedicated Schools Grant (DSG), compared with 2023/24 funding.
- 1.2. This report will consider each element of the block in detail; however, the application of the funding will be considered in separate reports at the same meeting.

## DSG 2024/25 Summary Position

- 2.1. *Table 1* shows the basic comparison of the headline funding. It remains important that the detailed information is taken into consideration as the headlines may be skewed by streamlining of grants, movement in data

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(e.g. pupil numbers), transfer of or new responsibilities. The settlement is not as generous as it seems on face value.

	Schools Block	CSSB	High Needs	Early Years	Total
	£m	£m	£m	£m	£m
2024/25	240.662	3.014	79.225	40.225	363.126
2023/24	231.030	3.309	76.852	24.845	336.035
Net Movement	9.632	-0.295	2.373	15.381	27.091
% increase	4%	-10%	3%	38%	7%

**Table 1, Overall DSG summary**

- 2.2. On face value the DSG for 2024/25 will have an increase of £27m, when compared directly with the funding in the 2023/24 DSG allocations.
- 2.3. It should be noted that the figures shown above are GROSS, i.e. they include notional funding for academies. The DfE will update the final figures for any deductions, e.g. recoupment, high needs import /export adjustments etc.
- 2.4. The Early Years (EY) Block remains provisional until validation updates for both January 2024 and January 2025. Late in December, the DfE held an emergency meeting with all Local Authorities (LAs), recognising a potential financial pressure arising from the updated September 2024 implementation of the two-year-old childcare (i.e. in year). In principle the funding that LAs receive will be based on seven months, however there is a disparity as seven months represents 26 weeks, whilst five months represents 12 weeks. At the time of writing, we await updates from DfE; this will be discussed in more detail in the EY specific report.

### 3. Schools Block

- 3.1. This section compares the detail for the Schools Block, which is the funding that is used to determine the Schools Funding Formula (and incorporates Growth Funding for basic needs)
- 3.2. *Table 2* shows the Schools Block Comparison after taking into account the streamlining of the Mainstream Schools Additional Grant (MSAG). For a notional figure, £222 per pupil has been used.

	Primary schools' unit of funding (£s)	Secondary schools' unit of funding (£s)	Number of pupils in primary schools	Number of pupils in secondary schools	Schools Pupil led Funding (£s)	Premises factor, including national non-domestic rates (NNDR) (£s)	Growth funding (£s)	Total schools block (£s)
2024/25	£6,039	£8,290	22,201	11,728	£231,290,080	£8,573,945	£798,052	£240,662,078
2023/24 (with notional MSAG included at £222 Per Pupil)	£6,000	£8,150	22,552	11,628	£230,074,577	£7,681,593	£851,084	£238,607,253.58
Movement	£39	£139	-351	100	£1,215,503	£892,352	£-53,032	£2,054,824
Mainstream Schools Additional Grant Streamlined (notional)	£222	£222						
	0.7%	1.7%	-1.6%	0.9%		10.4%	-6.6%	0.9%
2024/25			£134,074,148	£97,215,932				£2,054,824
2023/24			£135,307,196	£94,767,381				
			£-1,233,048	£2,448,551		£892,352	£-53,032	£2,054,823

Price	£872,924	£1,633,523
Volume	£-2,105,972	£815,028
	£-1,233,048	£2,448,551

**Table 2 Schools Block**

3.3. Table 1 noted that on face value, the schools block funding had increased by £9.6m (extract below in table 3)

	Schools Block
	£
2024/25	240,662,078
2023/24	231,029,841
Movement	9,632,237

**Table 3 Schools block extract**

3.4. The true increase is £2.055m, a notional figure of £7.577m has been added to the 2023/24 schools block to facilitate like for like comparison.

3.5. Of the increase shown in table 1, £7.577m **is not NEW money**; this is funding schools already receive **via the MSAG grant**. If the MSAG grant had remained as a grant, naturally there would be a small reduction due to the net reduction in overall pupil numbers.

3.6. Overall increase in schools block, is £2m, this represents approximately 0.9% net increase.

3.6.1. **Primary age** funding received –

- Overall increase of £39 per pupil, which is 0.7%
- Net funding attracted by Primary age pupils is **£1.2m** lower (£0.873k increase arising from price uplift of £39 per pupil, and £2m reduction from overall); reduction of 351 pupils.

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### 3.6.2. Secondary Age funding received

- Overall increase of £139 per pupil which is 1.7%
  - In net terms, there is an increase of **circa £2.5m**, of this £1.6m relates to increase in per pupil funding and whilst £815k relates to an increase based on 100 additional pupils.
- 3.7. Overall a net movement of £1.2m in pupil led funding, £0.9m increase in premises related funding (which includes, NNDR, PFI, exceptional factors and split sites)
- 3.8. The Growth Fund has also now been confirmed at £0.798m, which is a small reduction of £53k from 2023/24. **Schools Forum will recall at the previous meeting, the Growth Fund allocation was not provided by the DfE.**

## 4. Central Schools Services Block (CSSB)

- 4.1. The CSSB block is split into two elements:
- Element 1 is formula driven,
  - Element 2 is based on historic baseline and is abated at a rate of 20% each year.
- 4.2. *Table 4* below provides further detail and confirms a further reduction on the historic baseline figure of £0.324m. The table also notes a small increase of £29k deriving from a small increase of £1.22 in the funding rate for Element 1 (formula driven) applied to the total pupil numbers (which are 251 net lower than in 2023/24).

	CSSB unit of funding (£s)	CSSB pupil count	Funding for historic commitments (£s)	Total central school services block (£s)
2024/25	£50.62	33,928.00	£1,296,266	£3,013,702
2023/24	£49.40	34,179.00	£1,620,332	£3,308,775
Movement	£1.22	-251.00	-£324,066	-£295,073
Formula Led	£41,392.16	-£12,399.40		£28,993
Historic Baseline				-£324,066

Table 4, CSSB

- 4.3. The Education Service is currently working with Corporate Services, to support the loss of funding, whilst maintaining the services.

## 5. High Needs Block

- 5.1. The High Needs Block funds services is associated with Special Education including, Special Schools, alternative provision, out of borough placements, cost of Education Health Care Plans etc.
- 5.2. Table 5 below confirms the allocation for 2024/25 at £79m, this is a modest increase of £2.373m compared with 2023/24 representing approximately a 3% increase.
- 5.3. Of this increase, approximately £430k relates to a net increase of number of pupils in special schools (76 pupils); interestingly the funding rate is lower by £10 per pupil.
- 5.4. In 2023/24, the DfE provided an increase in funding to support the funding uplift payable to special schools. This has now been rolled into the floor and gains figure, which is why it appears large, but it is not new funding.
- 5.5. Whilst any increase in funding is welcomed, recognising that inflation (including staffing costs) is greater than 3%, this is in effect a real term cut in spending power and is likely to place additional pressure on an area that is already overspending.

	Total high needs elements in the funding floor and gains calculation (£s)	Basic entitlement factor (area cost adjusted) unit of funding (£s)	Number of pupils in special schools and academies	Import/export adjustment (based on January 2023 school census and February R06 2022 to 23 individualised learner record) (£s)	Additional Funding for Special Free Schools (£s)	Hospital education, alternative provision teachers pay/pension and supplementary funding factor (£s)	Total high needs block before deductions (£s)
2024/25	74,949,467	5,646	1,210	-2,973,000	12,000	404,894	79,224,900
2023/24	69,790,261	5,656	1,134	-2,973,000	18,000	397,906	76,851,702
Net Movement	5,159,206	-10	76	0	-6,000	6,988	2,373,198

3.0%

	Price	Volume	£	%
Pupil led	-12559.8	£429,088	£416,529	0.5%
Floors Ceilings			£1,956,669	2.5%
Net movement			£2,373,198	3.1%

**Table 5, High Needs Block**

## 6. Early Years (EY) Funding

- 6.1. Early Years Funding is potentially the most complex area as the funding allocated remains provisional until the period after which the accounts

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have closed. Table 1 noted, an overall increase in funding for EY block of £15.3m, extract shown below for reference (*Table 6*).

	£m
2024/25	40.23
2023/24	24.84
Net Increase	15.38

**Table 6, Early Years Block**

- 6.2. More detail is required to enable us to decipher the EY block; funding associated with new duties verses additional funding to support the expansion of the Early Years Offer.
- 6.3. *Table 6* provides a high level breakdown of the £15.381m increase in funding. Associated report elsewhere on this agenda will discuss the detailed application, including the formulaic split across the various components.

## **7. Other Grants**

- 7.1. The DfE has also confirmed the following grant information:

- 7.2. **Pupil Premium 2024/25**

- 7.2.1. The table below shows the updated pupil premium rates for 2024/25 compared with 2023/24. The table notes an increase of £25 (2%) for primary age pupil, with an increase of £15 (1%) for secondary age pupils. Funding is paid to those eligible under FSM ever 6. The table also confirms an increase of £40 (2%) for pupils looked after/other state of care. The final per pupil data will be confirmed most likely in summer 2024.

Pupil Premium		2023/24 Values		2024/25 Values		Movement			
Pupil eligibility criteria	Paid to	£ per primary-aged pupil per year	£ per secondary-aged pupil per year	£ per primary-aged pupil per year	£ per secondary-aged pupil per year	£ per primary-aged pupil per year		£ per secondary-aged pupil per year	
Pupils eligible for free school meals, or have been eligible in the past 6 years	School	£1,455	£1,035	£1,480	£1,050	£25	2%	£15	1%
Pupils previously looked after by a LA or other state care	School	£2,530	£2,530	£2,570	£2,570	£40	2%	£40	2%
Children who are looked after by the LA	LA	£2,530	£2,530	£2,570	£2,570	£40	2%	£40	2%

**Table 7, Pupil Premium**

## 8. Teachers Pay Grant

- 8.1 Schools Forum will be aware that the DfE allocated a specific grant to support schools with the 2023/24 academic year pay award. Funding received in the financial year 2023/24 was confirmed at a part year equivalent for 7 months.
- 8.2 The DfE has confirmed that for 2024/25, the funding will remain a separate grant however, for 2025/26 the grant is expected to roll into the main DSG funding. Schools Forum will note that the funding values show nominal increase in per pupil funding with a reduction in Free School Meals 6 (FSM6).
- 8.3 The table below shows the method. Please note that the starting figures are national figures, which have then been uplifted for Area Cost Adjustment (ACA) to establish Lewisham Specific Figures. ACA used for mainstream schools is 1.1666, whilst the ACA used for Special Schools is 1.2111.

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8.4 It should also be noted that the funding for mainstream schools will be provided on a school-by-school basis, we expect DfE to confirm allocations in June/July.

8.5 With regards special schools and Alternative Provision (AP), the allocation is more complex. The DfE will provide a proxy allocation to the Local Authority, based on current place numbers. This will be following by a revision in March. The expectation is that the funding is allocated in full to providers, however there is some discretion and requirement to consult attached to the grant conditions. Once we have final allocations, we will engage with the relevant stakeholders including Schools Forum.

	2024/25 National rates	Lewisham 2024/25 allowing for Area Cost Adjustment		2023/24	Full Year	difference	%
a basic per-pupil rate of £62 for primary pupils, including pupils in reception	£62.00	£73.57		£42.72	£73.23	£0.34	0.5%
a basic per-pupil rate of £86 for key stage 3 pupils	£86.00	£102.05		£59.33	£101.71	£0.34	0.3%
a basic per-pupil rate of £98 for key stage 4 pupils	£98.00	£116.29		£67.64	£115.95	£0.34	0.3%
a lump sum of £2,306	£2,306.00	£2,736.44		£1,596.06	£2,736.10	£0.34	0.0%
a FSM6 per-pupil rate of £53 per eligible primary pupil	£53.00	£62.89		£36.79	£63.06	-£0.17	-0.3%
a FSM6 per-pupil rate of £77 per eligible secondary pupil	£77.00	£91.37		£53.40	£91.54	-£0.17	-0.2%
Special Schools and AP	£446.00	£540.18		£314.90	£539.83	£0.35	0.1%

Table 8, Teachers' Pay Grant

## **9. Teachers' Pension Grant**

- 9.1 Schools forum will also be aware of an increase confirmed by the DfE with regards Teachers' Pension employer contribution of 5% to 28.68%. The DfE has confirmed that there will be an additional grant for 2024/2025 to reflect the additional costs of the increase to the employer contribution rates to the Teachers Pensions' Scheme from April 2024. Further details will be announced in due course.
- 9.2 As with all grant funding, allocation will be made based on a formula (very likely to mirror that of the teachers' pay grant). The main point to note is the grant allocation is more than likely expected to support average school costs. Where a school has larger than average teaching costs, there is likely to be a drift (i.e. potential pressure). Each school will need to test the sufficiency of this cost versus grant, based on their own schools information.

## **10. Financial implications**

- 10.1 There are no direct implications arising from this report, as the report is summarising the final settlement position for Lewisham in 2024/25 compared with 2023/24.
- 10.2 The settlement whilst confirming increases in funding, are likely to continue to place pressure on already existing pressures both at school level and Local Authority.

## **11. Legal implications**

- 11.1 There are no legal implications arising from this report. The report is for information only and provides detail of the DSG funding settlement as advised by the DfE.

## **12. Equalities implications**

- 12.1 There are no direct Equalities implications arising from this report. The report is providing an update of the funding settlement. There is an expectation that the DfE has undertaken any appropriate Equalities impact assessment when establishing the funding allocations for each LA.

## **13. Climate change and environmental implications**

- 13.1 There are climate change and environmental implications of this report.

## **14. Crime and disorder implications**

14.1 There are no crime and disorder implications of this report.

## **15. Health and wellbeing implications**

15.1 There are no direct health and wellbeing implications of this report.

## **16. Report authors and contact**

Mala Dadlani, Strategic Business Partner – CYP, [mala.dadlani@lewisham.gov.uk](mailto:mala.dadlani@lewisham.gov.uk)

# Agenda Item 6



## Schools Forum

**Report title: Dedicated Schools Grant 2024/25 Schools Block Submission of the Authority Proforma Tool (APT)**

Report 2 of 4

**Date:** 18 January 2024

**Key decision:** No

**Item no:** 6

## Outline and recommendations

The focus of the report is to detail the 2024/25 Schools Block.

The report proposes options for Schools Forum to consider and approve for submission to the Department for Education (DfE) of the Authority Proforma Tool (APT), which has been developed in line with the mandate provided by Schools Forum at the December meeting. The data used in the APT is provided by the DfE based on census submissions made by schools.

The report also confirms the de-delegation levels for 2024/25 – please note that in line with DfE requirements at present, only the schools currently academised are excluded from the calculation as far as the formal APT submission is concerned. The report gives an exemplification of the de-delegation levels post further expected academisation relating to three additional schools.

The report also provides comparative information with regards funding levels to 2023/24 where appropriate. However, this is limited due to the streamlining, particularly of the grant Mainstream School Additional Grant (MSAG).

### Timeline of engagement and decision-making

Forum to discuss and agree submission of the APT to the DfE on the 22<sup>nd</sup> of January 2024.

Schools can review draft budgets in the appendix provided. It should be noted that budgets could change depending on the validation process undertaken by the DfE following submission of the APT. Lewisham will formally write to all schools before the 28<sup>th</sup> February 2024, in line with statutory requirements. Until that point all information must be treated as provisional.

## 1. Purpose of Report

- 1.1. This report provides schools forum with the summary position of the Schools Block and the proposed application in line with the agreed mandate (Schools Forum December 2023).
- 1.2. Schools Forum is asked to:
  - 1.2.1. Note this report and in particular:
    - Consider options relating to Minimum Funding Guarantee (MFG) uplift applied (max 0.5%) - with a final recommendation for submission to the DfE. Lewisham recommends that 0% uplift is applied for 2024/25,

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with explanation provided in this report.

- Agree the de-delegation as set out in this report. Schools forum should note that the de-delegation shown currently includes the pupil data relating to three schools which are expected to convert post 31<sup>st</sup> March 2024, the DfE is clear that these schools must be included at the time of the APT submission. DfE will adjust at an appropriate time once the formal transfer has taken place.

## 2. DSG 2024/25 Schools Block

- 2.1. The summary report noted the 2024/25 DSG settlement and the Schools Block, as outlined in table 1 below. This table confirms the total funding available for use in the APT submission of £240.662m

**Table 1 Schools Block**

	Primary schools' unit of funding (£s)	Secondary schools' unit of funding (£s)	Number of pupils in primary schools	Number of pupils in secondary schools	Schools Pupil led Funding (£s)	Premises factor, including national non-domestic rates (NDR) (£s)	Growth funding (£s)	Total schools block (£s)
2024/25	£6,039	£8,290	22,201	11,728	£231,290,080	£8,573,945	£798,052	£240,662,078
2023/24 (with notional MSAG included at £222 Per Pupil)	£6,000	£8,150	22,552	11,628	£230,074,577	£7,681,593	£851,084	£238,607,253.58
Movement	£39	£139	-351	100	£1,215,503	£892,352	£-53,032	£2,054,824
Mainstream Schools Additional Grant Streamlined (notional)	£222	£222						
	0.7%	1.7%	-1.6%	0.9%		10.4%	-6.6%	0.9%
2024/25			£134,074,148	£97,215,932				£2,054,824
2023/24			£135,307,196	£94,767,381				
			£-1,233,048	£2,448,551		£892,352	£-53,032	£2,054,823

Price	£872,924	£1,633,523
Volume	£-2,105,972	£815,028
	£-1,233,048	£2,448,551

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- 2.2. The report further noted that approximately £7.577m of the increase related to the streamlining of the Mainstream Schools Additional Grant (MSAG) and was therefore not new money per se. The actual total value of new money is £2.055m.
- 2.3. Overall increase in schools block is £2m, which represents approximately 0.9% net increase.
- 2.3.1. **Primary age** funding received:
- Overall increase of 0.7% per pupil on price.
  - Net funding attracted by primary age pupils is **£1.2m** lower (£0.873k increase arising from price uplift of £39 per pupil, and £2m reduction from overall); reduction of 351 pupils.
- 2.3.2. **Secondary Age** funding received-
- Overall increase of £139 per pupil which is 1.7%.
  - In net terms, there is an increase of **circa £2.5m**; of this £1.6m relates to increase in per pupil funding and whilst £815k relates to an increase based on 100 additional pupils.
- 2.4. Overall, a net movement of £1.2m in pupil led funding, £0.9m increase in premises related funding, which includes, national non-domestic rates (NNDR), Private Finance Initiative (PFI), exceptional factors and split sites.
- 2.5. The Growth Fund has also now been confirmed at £0.798m, which is a small reduction of £53k from 2023/24. **Schools Forum will recall at the previous meeting; the Growth Fund allocation was not provided by the DfE.**

### 3. National Funding Formula (NFF) values applied

- 3.1. Appendix A shows the values that have been prescribed by the DfE for those Local Authorities (LAs) that follow the NFF, which have been used in the development of the Lewisham Formula (Forum has been agreed to comply fully with the NFF).
- 3.2. Under the principles of the NFF, LAs can apply from 0.0% to maximum 0.5% MFG uplift.
- 3.3. **Schools Forum should note that the benefit of this increase is only felt by those schools in receipt of MFG funding (i.e., it enhances the MFG protection that these schools already receive). Schools forum should also note that schools who are in receipt of MFG are therefore already being supported by Transitional Protection over and above the NFF funding rates as shown in appendix A.**

### 3.4. Option 1 – MFG at 0.5% (maximum allowable)

Table 2, Option 1

	Schools Block	APT @0.5% uplift (Growth - £200k)	High need Block
Option 1	240,662,078	240,362,660	299,418
		99.88%	0.12%

3.4.1. Under option 1, MFG uplift is applied at the 0.5% maximum. £200k has been allowed to support potential growth fund requirements. This leaves a remaining balance of £0.3m, representing 0.12% of the schools' budget to support the High Needs Block pressure.

3.4.2. Schools Forum should note the total value of MFG within Lewisham Schools is £3.2m across the 33 schools. MFG protection ranges from lowest £386 to highest £681k—average being circa £100k.

### 3.5. Option 2 – MFG at 0.0% (lowest MFG allowable)

Table 3, Option 2

	Schools Block	APT @0.0% uplift (Growth -£200k)	High Needs Block
Option 2	£240,662,078	£239,951,359	£710,719
		99.70%	0.30%

3.5.1. Under option 2, the MFG uplift is applied at 0%. £200k supports potential growth fund requirements (as per option 1). **To reiterate, the benefit MFG uplift only applies to the 33 schools currently in receipt of MFG. By applying 0.0% as the MFG position, the overall cost of MFG transitional protection is £2.8m (i.e. circa £0.4 less than option 1).**

3.5.2. Under DfE regulations it is permissible for LAs to transfer 0.5% of the total Schools Budget (£240.6m) to other blocks within the DSG which have funding pressure. As such, in theory a request of up to £1.2m. This is not possible within the current affordability, largely due to the high value of the MFG at £3.2m (0.5% uplift) and £2.8m (0.0% uplift). It should be noted that the growth fund allocation is £0.8m, however in both options £0.2m is supporting growth at present. Effectively this means that the growth fund is subsidising the APT (recognising the level of MFG applied across the 33 schools).



### 3.6. Option 3 – MFG at 0.25% (mid-way)

3.6.1. Schools forum had initially requested modelling of a mid-way approach. However, noting the movement from £0.3m to £0.7m the material difference suggests a mid-way approach is not appropriate.

3.7. Appendix B – provides a detailed breakdown on a school by school basis across the first two options. Schools Forum should note that at this stage schools can only consider this information as DRAFT, until final validation and sign off from DfE. For this reason, the DfE requires LAs to provide published information to schools by the 28<sup>th</sup> February each year.

## 4. Exceptional Factors

4.1. At the time of writing, Lewisham has applied to the DfE for exceptional factors to the value of £0.19m. At present, the factors are shown against the relevant schools and form part of the APT submission at school level. In the event the DfE rejects the disapplication requests, and on the assumption that the funding remains part of the Lewisham DSG, then this funding will form part of the transfer to the High Needs Block. Schools forum should further note, that if the exceptional factors are not supported by the DfE, discussions will need to take place with the affected schools to consider options available to them.

## 5. Schools Forum to approve Option 1 or 2

5.1. Schools forum is asked to note the information above and agree to the submission of either option 1 or option 2. **Officer Recommendation is to support option 2 recognising the ongoing pressures on the high needs block.** Elsewhere a detailed report on the High Needs Block notes a modest settlement for 2024/25 despite ongoing pressure on the High Needs Block. Lewisham Council in partnership with Schools Forum, continues to have wider obligations to deliver on its statutory role (within the wider funding context) of providing appropriate support for young people with special needs. As school's forum will be aware, Lewisham continues to progress with our local mitigation plan as well as the Newton/DfE Delivering Better Value (DBV) programme. We understand the challenges that schools are facing, however the request for the higher funding will better enable the LA to manage within the overall affordability. As previously stated, the funding supports 33 schools that are part of the transitional MFG support - which is already circa £2.8m over the NFF. By adding the additional 0.5% per option 1, the funding will enter the base of the school and take longer for the schools to move to the NFF in full.

5.2. **Schools Forum should further note that only representatives covering school age 5 to 16 are eligible to vote (includes both academy and maintained schools).**

## 6. De-Delegation

- 6.1. De-delegation applies only to schools that are maintained by the LA. At the Schools Forum December meeting the continuation of de-delegation at agreed levels, with a potential review of reducing the contingency value. was agreed in principle.
- 6.2. The DfE has advised that the LA cannot adjust for schools that are academising post 31<sup>st</sup> March 2024 for the purpose of the submission, albeit that this will be addressed once the transfers have formally taken place, as part of the DfE recoupment process. As such the figures shown below are GROSS (i.e. reconciled to the APT submission) and NET, for clarity and transparency of the actual funding that will be managed as part of the de-delegation process.
- 6.3. It should be noted that normally the agreed value is divided by the relevant data (e.g. pupil numbers), to determine the unit rates. Because of six schools converting, this will not be viable. Instead, the 2023/24 unit rate has been adjusted for inflation (where agreed with Schools Forum), to determine a new de-delegation level.
- 6.4. The proposed de-delegation is shown below with comparative details for 2023/24 and illustrating the further adjustments, recognising the transfer of three additional schools to academy from expected date of 1<sup>st</sup> April 2024.
- 6.5. Schools forum will note a reduction in funding for Lewisham learning. Consequently, the service and Lewisham Learning Board will consider options for service delivery and report back, potentially with a request for transitional support to address any balance.

Table 4, De-delegation proposal

				Variance	Variance
	23/24	24/25 (allowing for Jan converters - as per DfE requirement)	24/25 - revised, based on adj for Apr converters	Impact of academy transfer from 1st Jan	Impact of academy transfer from 1st Apr
Schools Contingency	£557,604	£498,952	£461,054	£-58,652	£-96,550
Free School Meals	£64,716	£61,568	£55,568	£-3,147	£-9,148
Licenses and subs	£205,687	£194,902	£179,901	£-10,785	£-25,786
Staff Costs and Supply Cover	£1,127,500	£1,069,436	£988,207	£-58,064	£-139,293
Lewisham Learning	£450,000	£402,268	£371,307	£-47,732	£-78,693
Total	£2,405,507	£2,227,126	£2,056,038	£-178,381	£-349,469

Primary				Variance	Variance
Rates compare	23/24	24/25 (allowing for Jan converters - as per DfE requirement)	24/25 - revised, based on adj for Apr converters	Impact of academy transfer from 1st Jan	Impact of academy transfer from 1st Apr
Schools Contingency	£19.86	£19.86	£19.86	£0.00	£0.00
Free School Meals	£7.98	£8.46	£8.46	£0.48	£0.48
Licenses and subs	£7.28	£7.72	£7.72	£0.44	£0.44
Staff Costs and Supply Cover	£40.15	£42.56	£42.56	£2.41	£2.41
Lewisham Learning	£15.93	£15.93	£15.93	£0.00	£0.00

Secondary				Variance	Variance
Rates compare	23/24	24/25 (allowing for Jan converters - as per DfE requirement)	24/25 - revised, based on adj for Apr converters	Impact of academy transfer from 1st Jan	Impact of academy transfer from 1st Apr
Schools Contingency	£19.46	£19.46	£19.46	£0.00	£0.00
Free School Meals	£8.13	£8.61	£8.61	£0.49	£0.49
Licenses and subs	£7.28	£7.72	£7.72	£0.44	£0.44
Staff Costs and Supply Cover	£39.35	£41.71	£41.71	£2.36	£2.36
Lewisham Learning	£15.93	£15.93	£15.93	£0.00	£0.00

6.6. Schools forum is asked to approve the de-delegation levels as outlined above.

## 7. Financial implications

7.1. With regards to the main delegated budget share, there are no direct financial implications arising from this report, as the report details the allocation of funding to schools mainly based on the national funding formula. Officer recommendation is to support option 2 for the reasons set out in this report. Lewisham (in partnership with Schools Forum), has a duty to consider the wider affordability of the DSG.

7.2. The report recognises that 33 schools are currently supported by Transitional funding (MFG), which they must address as part of their three year budget plans to ensure longer term sustainability.

7.3. The report recognises that at the time of writing, requests have been submitted to the DfE for two exceptional factors – for the purpose of

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completeness it is assumed they have/will be accepted. If they are not supported by the DfE, discussions will need to take place with the affected schools to consider options available to them.

- 7.4. The report also notes the reduced value arising from the de-delegation, which may potentially require a review of any services affected.

## **8. Legal implications**

- 8.1. There are no legal implications arising from this report.

## **9. Equalities implications**

- 9.1. There are no direct equalities implications arising from this report. The report is providing an update of the funding settlement. There is an expectation that the DfE has undertaken any appropriate Equalities Impact assessment when establishing the funding allocations for each LA.

## **10. Climate change and environmental implications**

- 10.1. There are no climate change and environmental implications of this report.

## **11. Crime and disorder implications**

- 11.1. There are no crime and disorder implications of this report.

## **12. Health and wellbeing implications**

- 12.1. There are no direct health and wellbeing implications.

## **13. Report authors and contact**

Mala Dadlani Strategic Business Partner – CYP, [mala.dadlani@lewisham.gov.uk](mailto:mala.dadlani@lewisham.gov.uk)

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## Appendix A – NFF Values

(2024/25 includes MSAG mainstream grant into DSG)

Factor	24-25 NFF including Area Cost Adjustment	24-25 Units	Amount		23-24 APT	Movement in factor values
Primary basic entitlement	£4,226.88	22,201.00	£93,841,027.26		£4,035.19	£191.69
KS3 <sup>1</sup> basic entitlement	£5,959.41	7,132.00	£42,502,487.16		£5,688.98	£270.42
KS4 <sup>2</sup> basic entitlement	£6,717.68	4,597.00	£30,881,185.53		£6,411.85	£305.84
Primary FSM <sup>3</sup>	£581.46	5,813.00	£3,380,046.74		£570.68	£10.78
Secondary FSM	£581.46	3,930.00	£2,285,151.16		£570.68	£10.78
Primary FSM6 <sup>4</sup>	£973.06	6,123.00	£5,958,053.73		£838.19	£134.87
Secondary FSM6	£1,423.99	4,379.00	£6,235,660.97		£1,224.59	£199.40
Primary IDACI <sup>5</sup> F	£278.87	4,948.32	£1,379,914.55		£273.45	£5.41
Primary IDACI E	£338.20	5,235.86	£1,770,756.39		£332.90	£5.30
Primary IDACI D	£528.06	2,892.80	£1,527,582.80		£523.12	£4.94
Primary IDACI C	£575.53	1,793.19	£1,032,037.48		£570.68	£4.85
Primary IDACI B	£611.13	1,658.90	£1,013,806.27		£606.35	£4.78
Primary IDACI A	£806.93	17.01	£13,728.07		£796.58	£10.35
Secondary IDACI F	£403.46	2,378.51	£959,642.91		£398.29	£5.18
Secondary IDACI E	£534.00	3,065.90	£1,637,180.72		£529.07	£4.93
Secondary IDACI D	£747.60	1,592.52	£1,190,558.47		£737.13	£10.47
Secondary IDACI C	£818.80	1,130.76	£925,863.69		£808.47	£10.33
Secondary IDACI B	£878.13	1,121.85	£985,127.38		£867.91	£10.22
Secondary IDACI A	£1,121.39		£11,218.33		£1,105.70	£15.70

<sup>1</sup> Key Stage 3

<sup>2</sup> Key Stage 4

<sup>3</sup> Free School Meals

<sup>4</sup> Pupils eligible for FSM in the last six years

<sup>5</sup> Income Deprivation Affecting Children Index

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		10.00				
Primary EAL <sup>6</sup>	£700.13	4,535.12	£3,175,172.05		£689.57	£10.56
Secondary EAL	£1,880.86	538.23	£1,012,333.32		£1,860.66	£20.20
Primary LPA <sup>7</sup>	£1,388.39	5,816.54	£8,075,635.75		£1,373.20	£15.19
Secondary LPA	£2,106.32	2,692.11	£5,670,441.57		£2,080.61	£25.71
Primary mobility	£1,139.19	303.85	£346,142.61		£1,123.53	£15.66
Secondary mobility	£1,637.59	56.90	£93,173.69		£1,616.93	£20.66
Primary lump sum	£159,487.10		£12,439,994.11		£152,181.76	£7,305.34
Secondary lump sum	£159,487.10				£152,181.76	£7,305.34

**new method of allocation per NFF**

Split sites basic eligibility funding	£63,723.64		£374,184.79			
Split sites distance funding	£31,921.15					

<sup>6</sup> English as an additional language

<sup>7</sup> Low prior attainment

## Appendix B

LAESTAB	School Name	Option 1	Option 2	Variance
		<b>240,162,660</b>	<b>239,751,359</b>	<b>-411,301</b>
2092000	Adamsrill Primary School	2,313,057	2,302,745	-10,312
2092002	St Winifred's RC Primary School	2,065,492	2,065,492	0
2092023	Athelney Primary School	2,317,966	2,317,966	0
2092029	Baring Primary School	1,366,149	1,360,287	-5,862
2092068	Beecroft Garden Primary	2,671,016	2,659,029	-11,987
2092127	Cooper's Lane Primary School	3,556,208	3,556,208	0
2092148	Dalmain Primary School	2,083,561	2,074,235	-9,326
2092158	Deptford Park Primary School	1,894,178	1,885,806	-8,372
2092163	Downderry Primary School	2,505,597	2,505,597	0
2092187	Edmund Waller Primary School	2,267,530	2,257,277	-10,254
2092197	Elfrida Primary School	2,239,455	2,239,455	0
2092225	Forster Park Primary School	2,250,615	2,240,614	-10,001
2092259	Gordonbrock Primary School	3,474,638	3,458,703	-15,935
2092267	Grinling Gibbons Primary School	1,328,485	1,328,485	0
2092289	Haseltine Primary School	2,371,775	2,361,013	-10,762
2092304	Brindishe Green School	3,563,982	3,547,462	-16,520
2092307	Holbeach Primary School	2,598,387	2,598,387	0
2092342	John Stainer Community Primary School	2,334,413	2,323,976	-10,437
2092347	Kelvin Grove Primary School	3,411,436	3,411,436	0
2092349	Kender Primary School	2,158,712	2,158,712	0
2092374	Launcelot Primary School	1,982,412	1,982,412	0
2092381	Brindishe Manor School	2,376,914	2,366,155	-10,759
2092390	Lucas Vale Primary School	1,456,884	1,456,884	0
2092403	Marvels Lane Primary School	2,369,451	2,368,871	-580
2092491	Rangefield Primary School	1,917,615	1,917,615	0
2092493	Rathfern Primary School	2,817,345	2,804,410	-12,935
2092529	Rushey Green Primary School	3,384,640	3,373,124	-11,517
2092536	Sandhurst Primary School	3,386,042	3,370,376	-15,666
2092570	Stillness Junior School	1,576,439	1,569,580	-6,859
2092571	Stillness Infant School	1,531,127	1,524,494	-6,634
2092606	Torridon Primary School	3,636,190	3,636,190	0

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2092782	John Ball Primary School	3,305,899	3,290,434	-15,465
2092811	Fairlawn Primary School	2,082,619	2,073,287	-9,332
2092815	Eliot Bank Primary School	2,255,533	2,245,367	-10,166
2092818	Twin Oaks Primary School	1,552,735	1,552,735	0
2092869	Myatt Garden Primary School	2,117,663	2,108,169	-9,495
2092870	Horniman Primary School	1,206,228	1,206,228	0
2092871	Perrymount Primary School	1,288,428	1,283,167	-5,261
2092878	Ashmead Primary School	2,022,448	2,017,606	-4,842
2092887	Brindishe Lee School	1,340,076	1,334,351	-5,725
2092911	Kilmorie Primary School	3,427,104	3,411,196	-15,907
2093301	All Saints' Church of England Primary School Blackheath	1,119,149	1,119,149	0
2093344	Good Shepherd RC School	1,310,058	1,310,058	0
2093360	Holy Trinity Church of England Primary School	1,274,686	1,274,686	0
2093374	St Margaret's Lee CofE Primary School	1,228,067	1,227,681	-386
2093416	St Augustine's Catholic Primary School and Nursery	1,268,403	1,268,403	0
2093420	St Bartholomews's Church of England Primary School	2,159,801	2,149,905	-9,896
2093454	St James's Hatcham Church of England Primary School	1,204,578	1,204,578	0
2093472	St John Baptist Southend Church of England Primary School	1,250,439	1,250,439	0
2093478	St Joseph's Catholic Primary School	1,022,230	1,022,230	0
2093518	St Mary's Lewisham Church of England Primary School	1,414,535	1,414,535	0
2093548	St Michael's Church of England Primary School	1,210,956	1,210,956	0
2093588	Our Lady and St Philip Neri Roman Catholic Primary School	1,429,910	1,429,910	0
2093594	St Saviour's Catholic Primary School	1,345,342	1,345,342	0
2093597	St Stephen's CofE Primary School	1,297,587	1,297,587	0
2093650	St William of York Catholic Primary School	1,222,986	1,222,986	0
2093661	Holy Cross Catholic Primary School	1,298,923	1,298,923	0
2094047	Deptford Green School	8,556,576	8,556,576	0
2094204	Sydenham School	9,299,772	9,299,772	0
2094249	Conisborough College	7,637,193	7,637,193	0
2094289	Forest Hill School	7,889,194	7,889,194	0
2094600	Addey and Stanhope School	5,298,664	5,298,664	0
2094646	Prendergast School	4,851,283	4,851,283	0
2094802	Bonus Pastor Catholic College	7,809,014	7,809,014	0
2094323	Prendergast Ladywell School	10,577,606	10,526,124	-51,482
2094636	Trinity Church of England School, Lewisham	7,959,799	7,921,220	-38,579

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2095201	Prendergast Vale School	6,633,212	6,633,212	0
2092001	Haberdashers' Hatcham Free School	2,170,942	2,160,996	-9,947
2092004	Turnham Academy	1,132,891	1,128,090	-4,801
2092005	Haberdashers' Hatcham Primary	2,337,204	2,337,204	0
2092006	Haberdashers' Knights Primary	1,141,521	1,141,521	0
2092108	Childeric Primary School	2,476,013	2,476,013	0
2092599	Tidemill Academy	2,696,043	2,696,043	0
2093325	St George's CofE Primary School	1,302,638	1,302,638	0
2094001	Sedgehill Academy	7,298,242	7,262,939	-35,303
2096905	Haberdashers' Hatcham College	8,770,024	8,770,024	0
2096906	Haberdashers' Knights Academy	8,896,237	8,896,237	0
2096907	St Matthew Academy	8,564,495	8,564,495	0

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# Agenda Item 7



## Schools Forum

**Report title: Dedicated Schools Grant 2024/25 Early Years Block**

Report 3 of 4

**Date:** 18 January 2024

**Key decision:** No

**Item no:** 7

## Outline and recommendations

The focus of this report is the Early Years (EY) Block.

The report provides detail on funding arrangements to support the extension of the EY Offer.

Schools Forum is asked to note the report.

Agree the funding formula for 2024/25 as set out in this report.

- Three-and-four-year-old funding.
- Two-year-old funding – Deprivation, Working Parent and under-two-year-old offer.

It is intended that the formula continues to match the current format previously agreed with schools forum as far as possible. With regards to two-year-old funding, the hourly rate to providers has been set at £9.22, which is the current rate being paid following the additional supplementary funding effective from Sept 2023.

There is however a requirement to consult with providers following schools forum agreement, noting however, that the final decision rests with the LA.

Note funding remains indicative and as such there is a requirement to establish suitable contingency.

Note the added responsibilities with regards to Special Educational Needs Inclusion Funding (SENIF).

Note that the 5% central hold back is now extended across all elements of the offer with the expectation that this will reduce going forward. A verbal update on the EY strategy will be provided at this meeting by the Head of EY – followed by a more detailed paper in Summer, to forum.

## Timeline of engagement and decision-making

- Late December 2023 announcement of the funding formula from DFE.
- 18<sup>th</sup> January 2024 – consideration and agreement of hourly rates by schools forum – expectation that Forum has sufficient membership of providers.
- Consultation with providers to inform of proposed hourly rates.
- School advised of funding late February (part of wider funding settlement), all other providers **MUST** have their hourly rates confirmed by end of March 2024 at latest.

### 1.1 Purpose of Report

- 1.2. This report provides detailed context of the various **EY ENTITLEMENTS** for 2024/24 and associated DSG as announced in the December 2023 and the DSG 2024/25 EY Block.
- 1.3. Report 1, on this Agenda confirmed the overall funding for the DSG. This showed an increase of £15.38m (*Table 1*). As stated in the main report, the EY Block remains provisional until the final data cleanse associated with January 2024 and January 2025. As such it remains important that sufficient contingency/allowance is factored in, as funding is based on the two counts as stated, however, allocation is based on termly counts of summer (12 weeks), autumn (12 weeks) and spring (14 weeks).

**Table 1**

<b>EY Block</b>	
	£m
2024/25	40.23
2023/24	24.84
Net Increase	15.38

- 1.4. Table 2 below provides a more detailed breakdown – which notes £4.3m increase in funding (on a like for like part time equivalent numbers) representing an 18% increase in funding. The table also notes additional funding of £11m to support new responsibilities/extension of the EY Entitlement Offer. Paragraphs following this table will explore further details with regards to each funding and EY offer.

Table 2

	2023/24	2024/25	Difference	Part Time Pupil Numbers	Increase in Funding
	Hourly Rate				
	£	£	£		£m
<b>3 &amp; 4 Year Old - Current Offer</b>					
Indicative funding allocation for universal entitlement for three-and-four-olds (£s)	6.33	7.24	0.91	4,197.25	£2.177
Indicative funding allocation for additional 15 hours entitlement for eligible working parents of three-and-four-olds (£s)	6.33	7.24	0.91	1,744.22	£0.905
Disability Access Funding				156.00	£0.018
Indicative funding allocation for EY pupil premium for three-and-four-olds (£s)				259.14	£0.009
Indicative supplementary funding allocation for maintained nursery schools (£s)	4.48	5.47	0.99	158.00	£0.089
<b>two-year-old - Current Offer</b>					
Indicative funding allocation for two-year-old disadvantaged entitlement (£s)	7.52	10.64	3.12	650.39	£1.157
<b>Total Increase in Funding Current Offer</b>					<b>£4.354</b>
<b>two-year-old - New</b>					
Indicative funding allocation for two-year-old working parent entitlement (£s)	0	10.64	10.64	1,065.21	£6.460
Indicative funding allocation for under twos entitlement (£s)	0	14.52	14.52	539.69	£4.467
Indicative funding allocation for EY pupil premium for two-year-olds (£s)				148.37	£0.058
Indicative funding allocation for EY pupil premium for under twos (£s)				7.42	£0.003
Funding allocation for disability access fund for two-year-olds (£s)				31.00	£0.028
Funding allocation for disability access fund for under twos (£s)				12.00	£0.011
<b>Total Increase in Funding for Extended Offer</b>					<b>£11.026</b>
<b>Total Movement in Funding (PROVISIONAL ALLOCATION)</b>					<b>£15.381</b>

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## 2. Funding rates

- 2.1 The EY national funding formulae (EYNFF) are used to determine the hourly funding rates to fund individual local authorities for the EY entitlements.
- 2.2. With the introduction of the new working parent entitlements for 2024 to 2025, DfE will be providing each local authority with **3 separate hourly funding rates** as follows:
- an hourly funding rate for 9-months-olds up to 2-years for the new working parent entitlement (**from 1 September 2024**) @ **£14.52 (this is new funding)**. It is not clear why the allocation given is based on 38 weeks when the scheme doesn't start till September 2024).
  - an hourly funding rate for two-year-olds which will be the same for both the disadvantaged and the working parent entitlements (from 1 April 2024) @ **£10.64 (£7.52 increase of £3.12, but please note this covers Teachers pay award and Employers Contributions to the Teachers' Pensions Scheme from April 2024)**.
  - an hourly funding rate for 3 and 4-year-olds for the universal and additional hours entitlements @ **£7.24 (£6.33 2023/24 increase of 91p, but please note this covers teachers' pay award and Employers Contributions to the Teachers' Pension scheme from April 2024)**.
- 2.3. Schools Forum should note:
- that local authorities' hourly funding rate for three-and-four-year-olds in 2024/ 2025 includes funding for teachers' pay and pensions. In 2023/2024 DfE mainstreamed the funding previously distributed through the teachers' pay grant (TPG) and the teachers' pension employer contribution grant (TPECG).
  - In 2024/2025, DfE have also mainstreamed the funding being provided in respect of the **September 2023 teachers' pay award**, as well as the additional funding to support providers with the **costs of employer contributions to the teachers' pension scheme which are due to increase from April 2024**. Schools Forum will note that in 2023/24, the Quality Factor was introduced to provide targeted funding for providers with Teaching Staff.
  - The two-year-old hourly rate has been **pegged at the current £9.22** (effective from September 2023, this incorporates deprivation at present and may be an area for review in the future.
  - Local authorities will continue to be funded for EY provision through the EY block in the DSG. There will continue to be a mid-year adjustment to the EY block of the DSG, based on data from the EY, school, and alternative provision censuses.
  - Local Authorities receive funding based on the January counts, however, allocate funding based on ACTUAL's per the 3 termly counts:
    - Summer (12 weeks)
    - Autumn (12 Weeks)
    - Spring (14 weeks)
  - It therefore remains crucial that:
    - Contingency is factored into any local formula to manage any drift between monies receivable and paid to providers.
    - Equally where the funding is managed centrally e.g. SENIF, there is regard that the budget is provisional and subject to change if indeed the final pupil numbers vary from the indicative.
    - The 5% LA holdback has now been extended to two-year-old funding. Our understanding is this will provide a short-term additional level of funding to support the embedding of the national policy changes after which the percentage is expected to be reduced to 3%. Clearly there is risk with this budget as it is a derivative of pupil numbers. The head of EY will provide a verbal update on the EY offer at this meeting with a more detailed fuller report in Summer.

- 2.4. As Schools Forum will note, there are significant changes taking place across the EY offer, post implementation, there will be a need to review the various elements and ensure harmonisation and consideration holistically.

### 3. New for 2024/25

- 3.1 Over summer 2023 the DfE consulted on proposals to ensure the funding system supports the delivery of the new working parent entitlements for children aged nine months up to and including two years old from 2024, which were announced at the Spring Budget in March 2023.
- 3.2. The government's response to the consultation was published on 29 November 2023 and the operational guide for 2024 to 2025 incorporates significant changes necessary to implement the proposals set out in that response.
- 3.3. The main changes to the guidance are:
- introduction of a new national funding formula (NFF) covering both the existing two-year-old entitlement for disadvantaged children and new working parent entitlements to be introduced in 2024 to 2025 for two-year-olds and children aged nine months up to two years.
  - new methodology for funding allocations for the new working parent entitlements for two-year-old children and children aged nine months up to two years old for 2024 to 2025.
  - extending the 95% pass-through requirement to the disadvantaged two-year-old entitlement and the new working parent entitlements.
  - extending local funding rules to the disadvantaged two-year-old entitlement and the new working parent entitlements.
  - a requirement for local authorities to have a disadvantaged two-year-old rate that is at least equal to their rate for two-year-old children of working parents.
  - new deprivation supplement arrangements for the disadvantaged two-year-old entitlement and the new working parent entitlements.
  - confirming the expectation that local authorities have special educational needs inclusion funds (SENIFs) for all children with special educational needs (SEN) eligible for or taking up the new and existing entitlements, regardless of the number of hours taken.
  - extending eligibility for EYPP and DAF to eligible children aged two years old and under accessing the entitlements from 2024 to 2025, and increases to the value of both funding streams.
  - extending the facility to apply for a disapplication from the **95% pass through rule** to the disadvantaged two-year-old entitlement and the new working parent entitlements, and changes to the criteria against which a disapplication will be considered.

### 4. Three-and-four-year-old offer

- 4.1. The three-and-four-year-old offer covers the current entitlement as;
- the universal 15 hours entitlement for all three-and-four-year-olds.

- the additional 15 hours entitlement for eligible working parents of three-and-four-year-olds.

4.2. Since its introduction in April 2017, the three-and-four-year-old formula has set the hourly funding rates that each local authority is paid to deliver the universal and additional entitlements for 3 and 4-year-olds. There is no change to the existing three-and-four-year-old formula, other than an annual update to some of the underlying data.

4.3. Table 3 below shows the 2023/24 funding and Table 4 shows the 2024/25. Schools Forum is asked to agree the 2024/25 allocation based on the current method. To note that following agreement, a general consultation is required with all providers.

**Table 3 – Table to show the 2023/24 method and funding split**

	2023/24						
	Hourly Rate Receivable	PTE -15 hours		PTE additional hours			Total
	6.33	4,197.25	£15,144,098	1,744.22	£6,293,321	100%	£21,437,419
Hourly Rate	5.40	4,197.25	£12,919,136	1,744.22	£5,368,710	85%	£18,287,846
SENIF	0.17	4,197.25	£406,713	1,744.22	£169,015	3%	£575,728
Targeted - Deprivation	0.23	4,197.25	£550,260	1,744.22	£228,667	4%	£778,927
Targeted - Quality Factor	0.11	4,197.25	£263,167	1,744.22	£109,363	2%	£372,530
Contingency	0.11	4,197.25	£263,167	1,744.22	£109,363	2%	£372,530
5% holdback	0.31	4,197.25	£741,654	1,744.22	£308,204	5%	£1,049,858

**Table 4 Above shows the 2024/25 two-year-old deprivation funding allocation based on 2023/24 method.**

	2024/25 Current Entitlement							Movement	
	Hourly Rate Receivable	PTE -15 hours		PTE additional hours			Total	Hourly rate	Total
	7.24	4,197.25	£17,321,211	1,744.22	£7,198,047	100%	£24,519,258	£0.13	£3,081,839
Hourly Rate	6.18	4,197.25	£14,776,389	1,744.22	£6,140,514	85%	£20,916,903	£0.78	£2,629,057
SENIF	0.19	4,197.25	£465,182	1,744.22	£193,312	3%	£658,495	£0.02	£82,767
Targeted - Deprivation	0.26	4,197.25	£629,365	1,744.22	£261,540	4%	£890,905	£0.03	£111,978
Targeted - Quality Factor	0.13	4,197.25	£301,000	1,744.22	£125,084	2%	£426,085	£0.02	£53,555
Contingency	0.13	4,197.25	£301,000	1,744.22	£125,084	2%	£426,085	£0.02	£53,555
5% holdback	0.35	4,197.25	£848,274	1,744.22	£352,511	5%	£1,200,785	£0.04	£150,927



## 5. Two-year-old disadvantage element

- 5.1. The two-year-old “disadvantage element” is effectively the current offer as providers will be aware of. Table 5 shows the current allocation and table 6 shows the 2024/25 proposed allocation. This is effective from 1<sup>st</sup> April 2024.

**Table 5**

	2023/24			
	Hourly Rate Receivable	PTE -15 hours	Total	%
	£		£	
	£7.52	650.39	£2,787,832	100%
SENIF	£0.57	650.39	£211,312	7.6%
Contingency	£0.16	650.39	£63,023	2.2%
Deprivation targeted	£0.00	0.00	£0	0.0%
5% holdback	£0.00	0.00	£0	0.0%
Hourly Rate	£6.79	650.39	£2,513,497	90.3%

**Table 6**

	2024/25 Based on current offer for two-year-olds				Movement	
	Hourly Rate Receivable	PTE - 15 hours	Total	%	Hourly Rate	Total
	£		£			
	£10.64	650.39	£3,944,485	100%	£3.12	£1,156,653
SENIF	£0.73	650.39	£270,627	6.9%	£0.16	£59,315
Contingency	£0.16	650.39	£59,316	1.5%	£0.00	£-3,707
Targeted Deprivation	£0.00	650.39	£0	0.0%	£0.00	£0
5% holdback	£0.53	650.39	£196,483	5.0%	£0.53	£196,483
Hourly Rate (includes deprivation)	£9.22	650.39	£3,418,060	86.7%	£1.75	£904,563

- 5.2. Schools Forum is asked to agree the application of the new hourly rate as outlined above. Schools’ forum to further note the following key points:

- The revised funding rate RECEIVABLE of £10.64 which is the National Funding

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## Formula Rate for Lewisham.

- Three points to note,
  - Whilst Targeted deprivation is a NEW element for 2024/25, to ensure that the targeted hourly rate remains at the current 2023/24 academic level of £9.22, the deprivation element is incorporated within this rate, i.e. no separate funding for deprivation. Following the full embedding of the EY offer, this will be revisited.
  - Requirement that the hourly rate must be at least that set for the new two-year-old offer.
  - New 95% rule enabling a 5% LA hold back.

## 6. Two-year-old Working Parent Entitlement

- 6.1. The 15 hours entitlement for eligible working parents of two-year-old children (new entitlement from 1 April 2024).
- 6.2. Table 7 below provides a breakdown of the £10.64 hourly rate based on the current disadvantage entitlement offer method. Schools' forum is asked to note and agree the method and split of the hourly rate. This is expected to mirror the two-year-old DISADVANTAGE offer and must have the same minimum hourly rate (i.e. £9.22)

**Table 7 - Proposed split of the two-year-old Working Parent Entitlement**

NEW OFFER	Indicative funding allocation for two-year-old working parent entitlement			
	Hourly Rate Receivable	PTE -15 hours	Total	%
	£		£	
	£10.64	1,065.21	£6,460,286	100%
SENIF	£0.73	1,065.21	£443,234	6.9%
Contingency	£0.16	1,065.21	£97,147	1.5%
Deprivation targetted	£0.00	1,065.21	£0	0.0%
5% holdback	£0.53	1,065.21	£321,800	5.0%
Hourly Rate (incl Deprivation)	£9.22	1,065.21	£5,598,105	86.7%

## 7. EY offer for under twos entitlement.

- 7.1. This is NEW from September 2024 and is the funding for nine-months-olds-up to two-years for the new working parent entitlement. Table 8 below shows an indicative funding position based on an hourly rate of £14.52 applied over 539.69 PTE (per DfE calculations). Schools forum is asked to agree the allocation split of the hourly rate based on table 8 below.
- 7.2. Schools Forum should note that the DfE states that:
- That the under-two offer will come into place from **SEPTEMBER 2024**,
  - The funding provided in the DSG settlement appears to be for 38 weeks. Therefore, it is not

possible for the full level of this funding to be receivable in 2024/25

Hourly rate for under 2s entitlement (£ / hr)	Estimated number for under 2s entitlement (part-time equivalent)	Indicative funding allocation for under 2s entitlement (£s)
[K]	[L]	[M]
		= [K] * [L] * 15 * 38
14.52	539.69	4,466,691.00

- Furthermore, an emergency meeting was held by the DfE, where some Local Authorities had raised concerns that if the total funding is allocated as seven months, the way providers are paid (i.e. termly count but on the basis that seven months represents 26 weeks, whilst five months represents 12 weeks, there is likely to be a transfer of financial pressure in the first year 2024/25). Following on from this meeting the DfE has emailed to say the points are noted and a decision will be made “early in 2024”.
- Depending on if the outcome is known before Schools Forum meeting or not, it may be necessary to hold an extraordinary meeting of the forum, in the event the funding split requires revision. **School Forum is asked to note this financial risk and potential for an extra-ordinary forum meeting.**

**Table 8 Indicative funding for under 2s entitlement**

NEW OFFER	Indicative funding allocation for under 2s entitlement (£s)			
	Hourly Rate Receivable	PTE -15 hours	Total	%
	£		£	
	£14.52	539.69	£4,466,690	100%
SENIF	£1.10	539.69	£338,566	7.6%
Contingency	£0.31	539.69	£96,509	2.2%
Deprivation targetted	£0.73	539.69	£223,335	5.0%
5% holdback	£0.73	539.69	£223,335	5.0%
Hourly Rate	£11.65	539.69	£3,584,946	80.3%

## 8. Summary of funding proposed

- 8.1. Table 9 and 10 below provides a summarised version for school forum. For ease of reference the columns are colour co-ordinated to the detailed tables shown above for each entitlement. Table 9 shows the summarised information by “hourly rates” and demonstrates the 95% passthrough rate. Table 10 provides the summarised position however in totality of funding. Please note the funding remains indicative based on pupil numbers per count date. As stated previously in this report, the way funding is received and allocated does provide challenges for which it is necessary that a contingency is maintained.
- 8.2. Table 10 also confirms the total for the SENIF funding which is now an indicative £1.679m. This does however come with greater expectations from the DfE, Schools forum should remain mindful that Lewisham’s starting position for the SENIF is relatively low compared to other LA’s:
- confirms the expectation that local authorities have special educational needs inclusion funds (SENIFs) for all children with special educational needs (SEN)

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eligible for or taking up the new and existing entitlements, regardless of the number of hours taken.

- **95% passthrough** – for 2024/25, the passthrough remains at 95% and is extended to two-year-old funding as well. The DfE has indicated that this is likely to reduce to 97% going forward, however has not stated when. It is anticipated that the additional funding would support the implementation of the roll out.
- **Deprivation Factor** – at present it is proposed that for 2024/25 the current method of allocating funding for deprivation (which is target 21% highest IDACI), continues to be applied where deprivation remains a targeted factor, and that this is reviewed in more detail for 2025/26.

8.3. **Schools Forum to agree the continuation of the deprivation target method to 21% IDACI.**

**Table 9 - Summary of EY Offer**

	Indicative funding allocation for universal entitlement for three-and-four-olds (£s)	Indicative funding allocation for additional 15 hours entitlement for eligible working parents of three-and-four-olds (£s)	Indicative funding allocation for two-year-old disadvantaged entitlement (£s)	Indicative funding allocation for two-year-old working parent entitlement	Indicative funding allocation for under 2s entitlement (£s)
<b>Received</b>	7.24	7.24	£10.64	£10.64	£14.52
<b>Applied:</b>					
Hourly Rate	6.18	6.18	£9.22	£9.22	£12.58
SENIF	0.19	0.19	£0.73	£0.73	£1.00
Targeted - Deprivation	0.26	0.26	£0.00	£0.00	£0.00
Targeted - Quality Factor	0.13	0.13	0	0	0
Contingency	0.13	0.13	£0.16	£0.16	£0.22
5% holdback	0.35	0.35	£0.53	£0.53	£0.72
Pupil Numbers	4,197.25	1,744.22	650.39	1,065.21	540
Total Funding	£17,321,211	£7,198,047	£3,944,485	£6,460,286	£4,466,690
Passthrough Rate	95%	95%	95%	95%	95%

**Table 10 Summary of EY Entitlement (Hourly Rate)**

Total Funding for Hourly Rates	Indicative funding allocation for universal entitlement for three-and-four-olds (£s)	Indicative funding allocation for additional 15 hours entitlement for eligible working parents of three-and-four-olds (£s)	Indicative funding allocation for two-year-old disadvantaged entitlement (£s)	Indicative funding allocation for two-year-old working parent entitlement	Indicative funding allocation for under 2s entitlement (£s)	Total Hourly Rate Funding
Hourly Rate	£14,776,389	£6,140,514	£3,418,060	£5,598,105	£3,870,572	£33,551,548
SENIF	£465,182	£193,312	£270,627	£443,234	£306,455	£1,678,811
Targeted - Deprivation	£629,365	£261,540	£0	£0	£0	£890,905
Targeted - Quality Factor	£301,000	£125,084	£0	£0	£0	£426,085
Contingency	£301,000	£125,084	£59,316	£97,147	£67,168	£649,716
5% holdback	£848,274	£352,511	£196,483	£321,800	£222,495	£1,941,563
<b>Total</b>	<b>£17,321,211</b>	<b>£7,198,047</b>	<b>£3,944,485</b>	<b>£6,460,286</b>	<b>£4,466,690</b>	<b>£39,390,720</b>

**9. Other Funding within the EY Block (Disability Access Funding, Pupil Premium and Nursery Maintained Schools Supplementary Funding)**

- 9.1. In addition to the EY Block entitlement offers covered so far, the EY block also provides funding to support other aspects of targeted funding. Table 11 shows the indicative funding for each element.
- 9.2. As with the entire EY block, the figures remain provisional subject to the finalisation of the EY Census in 2024 January and 2025 January.

**Table 11  
Summary of EY Entitlement (total indicative funding)**

	Indicative funding allocation for EY pupil premium for three-and-four-olds (£s)	Indicative funding allocation for EY pupil premium for two-year-olds (£s)	Indicative funding allocation for EY pupil premium for under 2s (£s)	Funding allocation for disability access fund for three-and-four-olds (£s)	Funding allocation for disability access fund for two-year-olds (£s)	Funding allocation for disability access fund for under 2s (£s)	Indicative supplementary funding allocation for maintained nursery schools (£s)	Total Additional Funding
	£100,443	£57,509	£2,876	£141,960	£28,210	£10,920	£492,629	£834,547
Pupil Premium	£100,443	£57,509	£2,876					£160,828
DAF				£141,960	£28,210	£10,920		£181,090
NMS							£492,629	£492,629
Hourly Rate Equivalent	£0.68	£0.68	£0.68	£1.60	£1.60	£1.60	£5.47	
<b>Pupil Numbers</b>	<b>259.14</b>	<b>148.37</b>	<b>7.42</b>	<b>156.00</b>	<b>31.00</b>	<b>12.00</b>	<b>158.00</b>	

## 10. Financial implications

- 10.1 There are no direct implications to the Council arising from this report per se, some areas are very new and will require a post implementation review in 2025/26 to establish the appropriateness of the funding allocated.
- 10.2 The report is mainly confirming detail of the EY Block across the key offers:
- the 15 hours entitlement for eligible working parents of children from nine months to two years old (new entitlement from 1 September 2024).
  - the 15 hours entitlement for eligible working parents of two-year-old children (new entitlement from 1 April 2024).
  - the 15 hours entitlement for disadvantaged two-year-olds.
  - the universal 15 hours entitlement for all three-and-four-year-olds.
  - the additional 15 hours entitlement for eligible working parents of three-and-four-year-olds.
- 10.3 The report also confirms indicative funding for wider targeted funding streams within the EY Block of:
- Disability Access Funding (DAF)
  - EY Pupil Premium
  - Nursery Maintained Schools Funding
- 10.4. In all cases the funding remains provisional and carries an element of risk, for which it remains critical that supporting contingency is made available. The recommendations to Schools Forum incorporate some level of contingency based on the current EY entitlement offer.
- 10.5. 2024/25 sees the introduction of the following extensions as announced in the spring 2023 budget. The report notes additional risk relating to the under two-year-old offer for 2024/25 - which the DfE is aware of and for which further guidance is awaited around:
- the 15 hours entitlement for eligible working parents of children from nine months to two years old (new entitlement from 1 September 2024).
  - the 15 hours entitlement for eligible working parents of two-year-old children (new entitlement from 1 April 2024).
- 10.6. Following this meeting of the forum, there will be a requirement to undertake a consultation with stakeholders and ensure that all providers are aware of their funding rates for 2024/25 by the 31<sup>st</sup> March 2024.

## 11. Legal implications

- 11.1 There are no legal implications arising from this report. The report is for information only and provides detail of the DSG funding settlement as advised by the DfE.

## 12. Equalities implications

- 12.1 There are no direct equalities implications arising from this report. The report is providing an update of the funding settlement to ensure that funding is distributed in line with statutory requirements. There is an expectation that DfE has undertaken any appropriate equalities impact assessment (EIA) when establishing the funding allocations for each LA. As stated in this report, there is significant change taking place across the whole EY

entitlement, which is being phased in. EIA will be incorporated into delivery of the programme, to ensure no unintended consequences.

### **13. Climate change and environmental implications**

13.1 There are climate change and environmental implications of this report.

### **14. Crime and disorder implications**

14.1 There are no crime and disorder implications of this report.

### **15. Health and wellbeing implications**

15.1 There are no direct health and wellbeing implications.

### **16. Report authors and contact**

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# Agenda Item 8



## Schools Forum

**Report title: Dedicated Schools Grant 2024/25, High Needs Block**

Report 4 of 4

**Date:** 18 January 2024

**Key decision:** No

**Item no:** 8

### Outline and recommendations

This is the 4<sup>th</sup> report relating to the DSG financial settlement for 2024/25.

Schools Forum to note the overall funding position for 2024/25 which shows a modest increase in funding of circa £2.4m (from £76.8m to £79.2m) this represents an increase of approximately 3%.

Schools Forum to further note that the pressure on the High Needs Block on average has been circa £4m to £5m – however that has been against a backdrop of significant higher levels of High Needs Funding. The settlement for 2024/25, is therefore likely to add further pressure to the HNB.

Schools Forum to further note that Lewisham council is continuing to progress with its local mitigation plan placement and sufficiency plan, which is now potentially also being supplemented by the Delivering Better Value (DBV), DfE initiative, should the recently submitted grant application be successful.

Schools Forum is asked to consider this report alongside the agreement of the 2<sup>nd</sup> report which discusses the submission of the APT tool and the potential transfer of max 0.5% to the High Needs Block.



## Timeline of engagement and decision-making

This report is for information only and sets context for the associated reports. Any appropriate engagement or decision making will form part of the detailed reports specific to that funding block.

### 1. Purpose of Report

- 1.1. This report provides schools forum with the detail relating to the High Needs Block settlement for 2024/25.
- 1.2. The report will also contextualise the demand position which suggest that for 2024/25, the High Needs Block will continue to face pressure,

### 2. High Needs Block 2024/25

- 2.1. Report one on the DSG settlement confirmed that the High Needs Value for 2024/25 will be £79.2m compared with an equivalent £76.8m in 2023/24. This is a modest increase in funding of approximately 3% £2.4m.
- 2.2. Of this increase, approximately £430k relates to a net increase of number of pupils in special schools (76 pupils), interestingly the funding rate is lower by £10, per pupil.
- 2.3. In 2023/24, the DfE provided increase in funding to support the funding uplift payable to special schools. This has now been rolled into the floor and gains figure which is why it appears large - but is not new funding.
- 2.4. Whilst any increase in funding is welcomed, recognising that inflation including staffing costs are greater than 3%, this is in effect a real term cut in spending power and is likely to place additional pressure on an area that is already overspending.
- 2.5. Table 1 below shows further detail recognising for example an increase in funding of £416k noting an increase of 76 pupils i.e. circa £5.6k per pupil.

### High Needs Block Table 1

	Total high needs elements in the funding floor and gains calculation (£s)	Basic entitlement factor (area cost adjusted) unit of funding (£s)	Number of pupils in special schools and academies	Import/export adjustment (based on January 2023 school census and February R06 2022 to 23 individualised learner record) (£s)	Additional Funding for Special Free Schools (£s)	Hospital education, alternative provision teachers pay/pension and supplementary funding factor (£s)	Total high needs block before deductions (£s)
2024/25	74,949,467	5,646	1,210	-2,973,000	12,000	404,894	79,224,900
2023/24	69,790,261	5,656	1,134	-2,973,000	18,000	397,906	76,851,702
Net Movement	5,159,206	-10	76	0	-6,000	6,988	2,373,198

3.0%

	Price	Volume	£	%
Pupil led	-12559.8	£429,088	£416,529	0.5%
Floors Ceilings			£1,956,669	2.5%
Net movement			£2,373,198	3.1%

2.6. In addition to the DSG funding totals above, Special Schools (and Hospital Schools) will continue to receive in 2024 to 2025 a separate TPAG which they will have received for the period September 2023 to March 2024.

- The funding rate for 2024 to 2025 financial year is £446 per place.

2.7. There will be an additional grant for 2024 to 2025 to reflect the additional costs of the increase of 5 percentage points, to 28.6%, to the employer contribution rates to the teachers' pensions scheme from April 2024. Further details will be announced in due course.

2.8. These separate grants should not be confused with the [historic teachers' pay and pensions](#) funding which local authorities are also required to pass on to special and AP schools on a per place basis.

2.9. The DSG conditions of grant place a similar MFG guarantee of 0% to 0.5%. At present there is no expectation of change to the high needs banding structure in place, therefore MFG is unlikely to apply. However this will be tested as part of the final allocations to schools.

### 3. Continuing Pressure on the High Needs Block

3.1. As previously reported to Schools Forum and discussed with the wider forum working group, like the case with most Local Authorities, Lewisham continues to face pressure on its High Needs Block. This is despite significant work undertaken within the mitigation plan. The feedback from Newton, Cipfa and DFE towards the actions taken to date by Lewisham was very positive and recognised that without those actions the deficit would have been significantly larger.

3.2. The position on the High Needs Block at present notes an £11m brought forward balance with a projected potential increase of £3m in the current financial year. The £3m figure is after allowing for additional contributions from the Schools Block and EY block as agreed with Schools Forum. The

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expected deficit at the end of this year is expected to be circa £14m cumulative.

3.3. The following tables show a comparative position between December 2022 and December 2023 with a net increase of 250 Education Health Care Plans (EHCP), over a 12 month period. The data also notes that of the increase more pupils are being placed within Lewisham.

3.4. The data also notes that the key primary needs are Autistic Spectrum Disorder (ASD), Social, Emotional and Mental health (SEMH), Speech, Language and Communication Needs (SLCN); the average cost for each being:

- ASD £17.5k
- SEMH £24k
- SLCN £14,5k.

Whilst caution is always required in the use of average data, this clearly shows that the cost per pupil is higher than the funding receivable i.e. taking a simple calculation – if increase in EHCP remains say at 250, £3m divided by 250 = £12k. Even taking a crude average of £18k per pupil, that would lead to 250 x £6k = suggesting a minimum additional overspend of between £1.5m to £2m. Thus noting 2023/24 overspend (before any subsidy of £5m, plus additional overspend of circa £1.5m = circa £6m to £7m).

Table 2

## All EHCPs

	Dec-22	Dec-23	Movement from Dec 2022
Total number of EHCPs	3316	3566	250
Total EHCP as % of predicted 0-25 GLA population (2022)	3.5%	3.77%	0.3%
Total number of new EHCPs	38	24	-14
New EHCPs as % of total EHCPs	1.1%	0.7%	-0.5%
% of new EHCPs issued within 20 weeks	13.20%	50.00%	37%

	Dec-22	Dec-23	Movement from Dec 2022	
Age Breakdown	Under 5s	91	38	-53
	Primary	1113	1279	166
	Secondary	1208	1288	80
	Post-secondary	904	961	57
	Grand Total	3316	3566	250

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		Dec-22	Dec-23	Movement from Dec 2022
Placements - Borough	Lewisham provisions	2222	2404	182
	Out-of-borough provisions	1069	1106	37
	No current placement (NEET, out of school, awaiting placement with alternative provision in place )	25	56	31
	Lewisham provision - Total Cost	£31,378,170	£33,889,502	£2,511,331
	Out-of-borough provision - Total Cost	£24,873,170	£27,860,150	£2,986,979

		Dec-22	Dec-23	Movement from Dec 2022
Primary Need	ADHD	80	57	-23
	ASD	1200	1281	81
	HI	43	37	-6
	MLD	134	121	-13
	MSI	13	12	-1
	Other	101	134	33
	PD	90	85	-5
	PMLD	34	30	-4
	SLD	211	205	-6
	SEMH	337	389	52
	SpLD	119	137	18
	SLCN	935	1059	124
	VI	19	19	0
	Not Stated	0	0	0
	Grand Total	3316	3566	250

		Dec-22	Dec-23	Movement from Dec 2022
Primary Need - Average Cost	ADHD	£17,123	£13,275	£-3,848
	ASD	£17,649	£17,566	£-83
	HI	£16,972	£29,721	£12,749
	MLD	£17,352	£15,990	£-1,362
	MSI	£21,813	£22,464	£651
	Other	£21,502	£20,871	£-631
	PD	£19,091	£19,363	£272
	PMLD	£31,032	£34,198	£3,166
	SLD	£24,771	£26,561	£1,790
	SEMH	£22,786	£24,671	£1,884
	SpLD	£15,523	£15,666	£143
	SLCN	£14,343	£14,563	£220
	VI	£15,951	£16,524	£573

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	Not Stated	£0	£0	£0
	Average over all	£17,824	£18,169	£15,525

#### 4. Financial implications

- 4.1. This report is for information and does not require any approvals from Schools Forum. The report however does recognise and note the continuing pressure on the High Needs Block against an extremely modest funding settlement.
- 4.2. The report further notes that whilst good progress has been made and continues to be made, the pressure on the High Needs Block is expected to present challenges.
- 4.3. Based on data provided this suggests that for 2025/26 the overspend is likely to continue to increase. Clearly, there could be potential level of cost reduction arising from the mitigations but in general it seems that the cumulative overspend will continue to increase. The forecast for 2023/24 is a cumulative circa £14.

#### 5. Legal implications

- 5.1. There are no legal implications arising from this report. The report is for information only and provides detail of the DSG High Needs Settlement with local context on the pressure.

#### 6. Equalities implications

- 6.1 There are no direct EI implications arising from this report. The report is providing an update of the funding settlement. There is an expectation that DfE has undertaken any appropriate equalities impact assessment (EIA) when establishing the funding allocations for each LA.

#### 7. Climate change and environmental implications

- 7.1. There are no climate change and environmental implications of this report.

#### 8. Crime and disorder implications

- 8.1. There are no crime and disorder implications of this report.

#### 9. Health and wellbeing implications

- 9.1. There are no direct health and wellbeing implications

## 10. Report authors and contact

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# High Needs Updates Schools Forum

Reinhild Onuoha

January 2024

# Local and National Data

- 3566 EHC Plans maintained in Dec 2023
- Slower growth of EHCP's, new EHCPs as % of total EHCPs is 0.7% compared to 1.3%-1.8% between August and November 2023
- 50% of EHCP's issued within 20 weeks, in line with national picture
- 2404 CYP with EHCP's in Lewisham provisions-increased; 1106 in OOB provisions
- no current placement -in-between settings and receiving tuition/alternative provision : reduced from 134 in August, 97 in Sept to 56 in December.
- Number of pupils with EHCPs in independent/non-maintained specialist schools (I/N-MSS) over the last three years: 2021-203; 2022- 195; 2023-184
- 37.7% of our learners with EHCP are in specialist provision



# Updates

- SEN Support Funding

Based on feedback at the last SEND High Needs Subgroup, it has been agreed that a session will be offered in the Spring Term to all Headteachers to advise on the funding available to individual schools.

- DfE's Delivering Better Value Programme

Grant application for £1 million submitted on the 21.12.23, first phase of assurer work from Newton and DfE has taken place, LA is currently revising minor changes to the bid. Feedback so far from assurers has been very positive with the risk rating provided only identifying three 'red's.

- Commissioning Intentions SEN Places

A detailed report will be presented to Schools Forum in June 2024 to advise on the LA's commissioning intentions related to SEN places for the future year/years

# Agenda Item 9



## Schools Forum

**Report title: Revision of membership of Schools Forum**

**Date:** 18 January 2024

**Key decision:** No

**Item no:** 9

### Outline and recommendations

1. Schools Forum to note that as a consequence of six schools academising, there is a significant shift in balance of pupils supported by maintained schools to academy schools.
2. The report confirms the new membership, effective for the financial year 2024/25.
3. Schools Forum to agree the revised constitution and accordingly invite the relevant School representative groups to confirm representatives to fulfil the Schools Forum membership in accordance.

## Timeline of engagement and decision-making

18<sup>th</sup> January 2024

Period from January 2024 to next meeting expected late summer 2024 – representatives to provide nominated representatives.

### 1. Purpose of Report

- 1.1. The purpose of this report is to provide data to support a revision of the Schools Forum Constitution from 2024/25

### 2. Primary, secondary and academy school representation.

- 2.1. Based on the October 2023 census, **table 1** below confirms that there are 33,930 pupils in Lewisham Schools. The table further shows the split over maintained primary, maintained secondary and academy schools. It should be noted the for the purpose of forum representation, academy pupil numbers do not require categorisation across their age phase. Also, where a school is an all through maintained school, the pupils are shown based on the age profile and takes into account recent and notified pending academy conversions.

Oct 2023		
Number on Roll	33,930	
Primary	19112	56%
Secondary	4190	12%
Recoupment Academy	10628	31%

**Table 1, October 2023 pupil numbers**

- 2.2. Schools Forum has 15 representatives. **Table 2** shows the current distribution and **table 3** shows the revised distribution necessary once recent and pending notified academy conversions are complete.

	Current Constitution			Total	
	Heads	Governors	Other		
<b>Primary</b>	7	2		9	60%
<b>Secondary</b>	2	2		4	27%
<b>Academy</b>	2	0		2	13%
	11	4	0	15	100%

**Table 2, Current constitution**

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	Revised Constitution			Total	
	Heads	Governor	Rep.		
<b>Primary</b>	6	2		8	56%
<b>Secondary</b>	1	1		2	12%
<b>Academy</b>			5	5	31%
	12	3	0	15	100%

**Table 3, Revised constitution**

- 2.3. At present within the maintained sector representatives, one headteacher (Prendergast Ladywell) and one governor (Leathersellers) need to step down from their maintained school representative roles. Another governor (Bonus Pastor) will need to step down when their school converts. These individuals may wish to stand as Academy representatives. This would need to be agreed by the Academy group schools, following due process.
- 2.4. **Table 4** below shows the current filled posts versus vacant posts and incorporates recent and pending notified academy conversions.

	Filled			Total	Vacancy
	Heads	Governor	Rep.		
<b>Primary</b>	3	2		5	1x primary head vacancy. 2x membership expiring Jan 2024 (David Lucas and Maxine Osbaldeston)
<b>Secondary</b>	1	0		1	1x secondary governor vacancy
<b>Academy</b>			1	1	4x academy vacancy
	6	4	0	10	

**Table 4, Representatives and vacancies**

- 2.5. The remainder of the forum membership remains unchanged and is shown below for completeness.

	Heads	Governors	Other	Total
Maintained Nursery School	1			1
Special School	1	1		2
14-19 Consortium Rep			1	1
Private, Voluntary, Independent providers			1	1
Pupil Referral Unit Head	1			1
Dioceses Authorities			2	2
<b>Total</b>	<b>3</b>	<b>1</b>	<b>4</b>	<b>8</b>

**Table 5, forum groups membership.**

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- 2.6. In relation to the remainder of the forum groups membership, currently there are the following vacancies-
- 1x Special School – Governor,
  - 1x Southwark Diocesan Board of Education (CE)

### **3. Financial implications**

- 3.1. This report focuses on the constitution of Schools Forum membership as such there are no financial implications arising from this report.

### **4. Legal implications**

- 4.1. There are no legal implications arising from this report, as the report is recasting the membership to reflect the pupils supported by maintained and academy schools.

### **5. Equalities implication**

- 5.1. The report supports equality of representation across schools as the membership is being revised to reflect the changes in academy and maintained schools.

### **6. Climate change and environmental implications**

- 6.1. There are no climate change implications of this report.

### **7. Crime and disorder implications**

- 7.1. There are no crime and disorder implications of this report.

### **8. Health and wellbeing implications**

- 8.1. There are no direct health and wellbeing implications.

### **9. Report authors and contact**

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