

Total Membership 25
The Forum is quorate if at least 40% (10) of the members are present



London Borough of Waltham Forest
SCHOOLS FORUM

Day/Date/Time	Venue
Tuesday 14 May 2019 Tea/Coffee and Light Refreshments: 5:00pm Main Meeting: 5:30pm	Council Chambers, 1 st Floor, Waltham Forest Town Hall Forest Road Walthamstow E17 4JF
Contact:	Telephone / Email:
Clerk to Schools Forum	schoolforum@walthamforest.gov.uk
Maintained Primary Headteacher Representatives (4)	
Jane Harris	Edinburgh Primary
Kate Jennings	Mission Grove
Lindsey Lampard	Chingford C of E Primary
Linda Adair	Henry Maynard Primary School and Nursery
Ruth Boon	St Joseph's Infants
Primary Academies and Primary Free Schools Representatives (4)	
Amanda Daoud	Lime Trust Larkswood
Anne Powell	Riverley Primary
Lynne Harrowell	Lime Trust Larkswood
Maureen Okoye (Chair)	Davies Lane Primary Academy & Selwyn Primary
Maintained Primary Governor Representatives (1)	
Aktar Beg	Edinburgh Primary
Nursery School Representative (1)	
Helen Currie	Church Hill and Low Hall Nursery Schools and Childrens Centres
Maintained Secondary Headteacher Representatives (3)	
Clive Roswell	Willowfield School
Lynnette Parvez (Vice-Chair)	Kelmscott School
Secondary Academies and Secondary Free Schools Representatives (4)	
Gareth Cross	Connaught School for Girls
John Hernandez	Norlington School and Sixth Form
Mark Morrall	South Chingford Foundation School and Chingford Foundation School
Rob Pittard	Norlington School and Sixth Form
Maintained Secondary Governor Representative (1)	
Gillian Barker	Walthamstow School for Girls
Special School and Special Academies Representative (1)	
Gary Pocock	Hornbeam Academy
PRU (1)	
Catherine Davis	Hawkswood Group
Non School Members (4)	
Early Years Providers	Sarah Kendrick (Redwood Pre-School)
16-19 Providers	Joy Kettle (Waltham Forest College)
Trade Unions	Steve White (NEU)
Diocesan	Moira Bishop (Brentwood Diocese)

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AGENDA

Agenda Item	Report Name	Report Authors
1.	Welcome all and Apologies.	Chair
2.	Declarations of Interest	All
3.	Minutes of the Meeting held on 13 February 2019 and Matters Arising	Chair
3a	Decision Sheet from Meeting 13 February 2019	For the record
4.	Proposed High Needs Budget 2020-21	David Kilgallon
5.	Date of Next Meeting: Wednesday 19 June 2019 Second Extraordinary Meeting to Discuss High Needs 5:30pm (Light refreshments from 5:00pm) Council Chambers, Waltham Forest Town Hall	

MINUTES OF SCHOOLS FORUM MEETING
Wednesday 13 February 2019
Council Chambers, Waltham Forest Town Hall
5:30pm – 7pm

ATTENDEES	
Deborah Chapman	Clerk to Schools Forum meetingsandevents@walthamforest.gov.uk
Maintained Primary Headteacher Representatives (5)	
Kathryn Soulard	Greenleaf Primary
Kate Jennings	Mission Grove
Linda Adair	Henry Maynard Primary School and Nursery
Lindsey Lampard	Chingford CofE Primary
Ruth Boon	St Joseph Catholic Infants
Primary Academies and Primary Free Schools Representatives (4)	
Maureen Okoye (Chair)	Davies Lane Primary Academy & Selwyn Primary Academy
Lynne Harrowell	Lime Trust/Larkswood
Anne Powell	Riverley Primary
Amanda Daoud	Lime Trust/Larkswood
Maintained Primary Governor Representatives (1)	
Akhtar Beg	Edinburgh Primary (Not present)
Nursery School Representative (1)	
Helen Currie	Church Hill & Low Hall Nursery Schools
Maintained Secondary Headteacher Representatives (2)	
Clive Rosewell	Williowfield School
Lynnette Parvez (Vice-Chair)	Kelmscott School
Secondary Academies and Secondary Free School Representatives (4)	
Mark Morrall	South Chingford Foundation School and Chingford Foundation School
Gareth Cross	Connaught School for Girls
John Hernandez	Norlington School and Sixth Form
Rob Pittard	Norlington School and Sixth Form Akhtar
Maintained Secondary Governor Representative (1)	
Gillian Barker	Walthamstow School for Girls

Special School and Special Academies Representative (1)	
Gary Pocock	Hornbeam Academy
PRU (1)	
Catherine Davis	Hawkswood Group
Non-School Representatives (4)	
Sarah Kendrick	Redwood Pre-School – Early Years Provider
Moira Bishop	Brentwood Diocese - Diocesan
Joy Kettle	Waltham Forest College – 16-19 Providers
Steve White	NEU – Trade Unions
LBWF Officers	
David Kilgallon	Director of Learning and System Leadership
Duncan James-Pike	Strategic Finance Advisor - Children and Young People Services
Eve McLoughlin	Head of Early Years, Childcare and Business Development
Jerome Francis	Senior Accountant Education Finance
Raina Turner	Head of Education Finance
Sergio Dimech	Principal Accountant Education Finance
Deborah Chapman	Business Support – Operations/Clerk to Schools Forum
Observers	
Graham Jackson	Willowfield School
Shermaine Lewis	Frederick Bremer School
Apologies	
Linzi Roberts-Egan	Deputy Chief Executive
Steve White	Trade Unions, NEU
Joy Kettle	Waltham Forest College representing the 16-19 Providers Sector

1. Welcome and Apologies

The Chair welcomed all to the meeting. Apologies were noted in the table above.

Election of a new Chair

Members of Schools Forum were invited to give expressions of interest for the new Chair of the School Forum.

Maureen Okoye put herself forward for Chair of Schools Forum

Members of Schools Forum were invited to vote. They voted as follows:

Yes: 15

No: 0

Abstained: 0

Election of a vice Chair

Members of the school forum were invited to give expressions of interest for the new Chair of Schools Forum.

Lynnette Parvez put herself forward to be vice chair of Schools Forum. She stated this would be for the short term as she will only be on Schools Forum for the remainder of the academic year. Rob Pittard seconded Lynnette.

Members of Schools Forum were invited to vote. They voted as follows:

Yes: 12

No: 0

Abstained: 0

2. Declaration of Interest

There were no declarations of interest.

3. Minutes of the Meeting held on 16 January 2019 and Matters Arising

Minutes agreed

Matters Arising

None

3a. Decision Sheet from Meeting 16Co January 2019

Decision sheet was agreed.

4. Early years funding formula for the provision of free education places for 2, 3 and 4 year olds for 2019-20

Comments, Questions & Responses

Question: Will there still be claw back each term for payments?

Answer: Providers have always been able to provide updated numbers of pupils throughout the course of the year to allow amendments to be made to their monthly budget share and reduce the amount of clawbacks or balancing payments. In most instances this has been done, which has resulted in a reduction in adjustment payments. Unfortunately numbers were not always updated by all providers. The new system of monthly payments, based on actual numbers of pupils entered onto the EY pupil register, will ensure that providers are paid for all the hours that they deliver each month, as long as they have entered the correct details on the pupil register. This will potentially mean a different payment amount each month as based on 'actual' children hours; however it will mean that any monthly/termly reconciliations will be minimal or non-existent

Question: Maintained nursery school (option b). If MNS have to use their reserves, will reserves be refunded from LBWF

Answer: We don't know yet if the supplement will be removed, a decision from the Government is due in the next few months we believe. The Government has advised, which Helen Currie has confirmed, that there will be no cliff edge with regards to any potential removal of the MNS supplement. We are not clear as to what this means and whether this could be a phased reduction of the supplement. Maintained schools may need to use reserves if they cannot set a balanced budget. LBWF will work with maintained schools regarding business models and sustainability in order to assist them to set a balanced budget, and avoid the need to use reserves. There are currently no funds in the Early Years underspend reserves available to 'refund' any reserves that MNS may need to use to address any budget deficit. This can be looked at as part of the 2020/2021 EYNFF budget setting process, and if providers are minded to, and there is sufficient funding, we could consult on setting aside a budget to support the sustainability of MNS if required.

Question: Unable to access capital funding, reserves are available but maintenance of school is needed (150k). Using reserves to meet any top up funding removal will mean the school will close. School currently has high numbers of SEN children, they would need to go somewhere else.

Answer: Aware of the issue regarding the availability of capital funding restriction, The LA EY's team are currently working with property services and the schools capital team to explore ways to resolve this issue.

Comment: The support received from the LA is appreciated

Question: What happens if maintained school goes in deficit due to using surplus?

Answer: MNS are treated in the same way as any other maintained school. The LA EY's team will be working with Schools in financial difficulty team to support maintained schools not to go into deficit. The majority of MNS current reserves are sufficient for this not to be an immediate concern.

Question: The capital issues need to be resolved.
The capital funding issue is a national problem currently being faced by 392 schools.

Answer: We are looking at a holistic support package for capital and revenue that is accessible to schools.

We are looking at a holistic support package for capital and revenue that is accessible to schools.

Recommendations:

That Schools Forum **agrees:**

- 4.2.1 That the final hourly rates and indicative budget shares as set out in **Appendix A and B** should form the basis of monthly allocations to all Early Years providers in 2019-20.
- 4.2.2 An SEND Inclusion Fund budget of **£633,772** as set out in section 10.
- 4.2.3 An Early Years System Leadership budget of **£58,307** as set out in 9.6.
- 4.2.4 The proposed procedure for the collection of data and adjustment to budget shares in 2019-20 as set out in section 5.
- 4.2.5 The funding rates for 2, 3 & 4 year olds as set out in **Appendix F** for 2019-20 and the control total for 2019-20 as set out in **Appendix E**.

Members of Schools Forum were invited to vote. They voted as follows:

Yes: 15

No: 0

Abstained: 0

That Schools Forum **notes:**

- 4.2.6 The feedback from the final consultation as set out in **Appendix G**.

That final outturn expenditure figures for the 2018-19 Early Years Block (EYB) funding are not available currently. Final DfE/EFA EYB allocations

are also not available currently as these are based on January 2018 and January 2019 census data, which is not yet finalised and published. Both of these sets of data are due to be published by the DfE/EFA during Summer 2019.

4.2.7 Early Years underspend reserves will be used to cover any 2018-19 EYB budget reductions by the DfE/EFA. Further details on the Early Years underspend reserves will be provided to Schools Forum when accurate year-end expenditure is available.

4.2.8 that the LA is compliant with the DfE 95% pass through rate as outlined in the compliance tool as set out in **Appendix C**.

4.2.9 The EYFF per pupil hourly rates 2018-19 as set out in **Appendix F**.

5. High Needs Block Indicative Income and Expenditure for Financial Year 2019-20

Schools Forum was updated on the High Needs Block funding 2019-2020

Comments, Questions & Responses

Question: would it be appropriate for a secondary school representative who is not a member of Schools Forum to be part of the task and finish group

Response: Yes this would be very useful.

5.1 School Forum noted:

The HNB allocation to Waltham Forest for Financial Year 2019-20 is **£37.325 million**, including an additional £0.683 million which was announced in December 2018.

The forecast HNB budget attributable to the Local Authority (LA) in FY 2019-20 after Academy recoupment and contributions from the Early Years Block is estimated at **£29.436 million** an increase of **£157,000** compared to the previous financial year.

The current pressures and rates of funding mean that there is a forecast accumulated underfunding of **£3.8 million** as at 31 March 2020, excluding growth and mitigating actions.

The work being undertaken to address the underfunding.

There are two extraordinary Schools Forum meetings called for:

Tuesday 14 May and **Wednesday** 19 June 2019

6. Local Funding Formula

Schools Forum was updated on the Local Funding Formula 2019–20 (Indicative Budget Shares).

6.1 Schools Forum noted:

The overall resources available of £200.989 million, a net decrease of £0.102 million (0.1%) from 2018-19, comprising an increase of £0.878 million (0.4%) on school allocations and a decrease of £1.008 million (31%) for the Growth Fund.

The contents of this report.

Schools Forum noted that Appendix L will be amended and sent out.

7. Scheme for financing Schools – Maintained Schools Only

7.1 Maintained School representatives on Schools Forum to note:

The consultation process and responses.

7.2 Maintained School representatives on Schools Forum to approve:

The Scheme for Financing Schools, 2019.

Maintained School representatives on Schools Forum voted as follows:

Yes: 8

No: 0

Abstained: 0

8. Any other business

The Chair encouraged all members of Schools Forum to attend the extraordinary Schools Forum meetings on 14^h May 2019 and the 19 June 2019.

John Hernandez agreed to represent the secondary academies and secondary free schools on School Forum.

Date of Next Meeting: Tuesday 14^h May 2019, Council Chambers, Waltham Forest Town Hall, 5:30pm (Light refreshments from 5:00pm).

Schools Forum 13 February 2019

Summary of Decisions

Item 4 **Early years funding formula for the provision of free education places for 2, 3 and 4 year olds for 2019-20**

2.1 **Schools Forum agreed:**

- 2.1.1 That the final hourly rates and indicative budget shares as set out in Appendix A and B should form the basis of monthly allocations to all Early Years providers in 2019-20.
- 2.1.2 An SEND Inclusion Fund budget of £633,772 as set out in section 10.
- 2.1.3 An Early Years System Leadership budget of £58,307 as set out in 9.6.
- 2.1.4 The proposed procedure for the collection of data and adjustment to budget shares in 2019-20 as set out in section 5.
- 2.1.5 The funding rates for 2, 3 & 4 year olds as set out in Appendix F for 2019-20 and the control total for 2019-20 as set out in Appendix E.

2.2 **Schools Forum noted:**

- 2.2.1 The feedback from the final consultation as set out in Appendix G.
- 2.2.2 That final outturn expenditure figures for the 2018-19 Early Years Block (EYB) funding are not available currently. Final DfE/EFA EYB allocations are also not available currently as these are based on January 2018 and January 2019 census data, which is not yet finalised and published. Both of these sets of data are due to be published by the DfE/EFA during Summer 2019.
- 2.2.3 Early Years underspend reserves will be used to cover any 2018-19 EYB budget reductions by the DfE/EFA. Further details on the Early Years underspend reserves will be provided to Schools Forum when accurate year-end expenditure is available.
- 2.2.4 That the LA is compliant with the DfE 95% pass through rate as outlined in the compliance tool as set out in Appendix C.
- 2.2.5 The EYFF per pupil hourly rates 2018-19 as set out in Appendix F.

Item 5 **High Needs Block Indicative Income and Expenditure for Financial Year 2019-20**

2.1 **Schools Forum noted:**

- 2.1.1 The HNB allocation to Waltham Forest for Financial Year 2019-20 is £37.325 million, including an additional £0.683 million which was announced in December 2018.
- 2.1.1 The forecast HNB budget attributable to the Local Authority (LA) in FY 2019-20 after Academy recoupment and contributions from the Early Years Block is estimated at £29.436 million an increase of £157,000 compared to the previous financial year.
- 2.1.2 The current pressures and rates of funding mean that there is a forecast accumulated underfunding of £3.8 million as at 31 March 2020, excluding growth and mitigating actions.
- 2.1.3 The work being undertaken to address the underfunding.
- 2.1.4 There are two extraordinary Schools Forum meetings called for:
Tuesday 14 May and Wednesday 19 June 2019.

Item 6 **Local Funding Formula 2019-20: Indicative Budget Shares**

2.1 **Schools Forum noted:**

- 2.1.1 The overall resources available of £200.989 million, a net decrease of £0.102 million (0.1%) from 2018-19, comprising an increase of £0.878 million (0.4%) on school allocations and a decrease of £1.008 million (31%) for the Growth Fund.
- 2.1.2 The contents of this report.

Item 7 **Scheme for Financing Schools**

2.1 **Maintained School representatives on Schools Forum noted:**

- 2.1.1 The consultation process and responses.

2.2 **Maintained School representatives on Schools Forum approved:**

- 2.2.1 The Scheme for Financing Schools, 2019.

Meeting / Date	SCHOOLS FORUM 14 May 2019	Agenda Item	4
Report Title	Proposed High Needs Budget 2020-21		
Decision/ Discussion/ Information	For Discussion and Decision		
Report Author/ Contact details	David Kilgallon, Director of Learning and System Leadership, Tel 020 8496 3504 david.kilgallon@walthamforest.gov.uk		
Appendices	Appendix: Proposed Consultation Document and Appendices		

1. SUMMARY

1.1 This report presents a proposal to consult on the High Needs budget for 2020-21.

2 RECOMMENDATIONS

2.1 Schools Forum to **agree**:

2.1.1 That the proposed consultation document appended to this report shall be consulted on from 15 May to 12 June 2019 and that the consultation will include meetings with parents and governors.

2.1.2 That the outcome of the consultation and final proposals will be reported back to Schools Forum on 19 June 2019.

3 REASON

3.1 The Local Authority is required to consult annually on financial issues relating to arrangements for pupils with special educational needs, in particular the places to be commissioned by the LA and the arrangements for top-up funding.

4. BACKGROUND

4.1 Schools Forum refreshed the membership and terms of reference of the Inclusion Group in December 2018 with the intention of agreeing proposals to address the funding gap in the High Needs Block. The group met on 28 January, 13 February, 21 March and 23 April 2019.

4.2 The appended consultation document reflects the consensus reached by the Inclusion Group on 23 April 2019.

CONSULTATION ON ALLOCATION OF HIGH NEEDS FUNDING 2020-21

INTRODUCTION

The High Needs Block (HNB) allocation to Waltham Forest for Financial Year (FY) 2019-20 is £37.391 million, including an additional £0.683 million which was announced in December 2018.

The forecast HNB budget attributable to the Local Authority (LA) in FY 2019-20 after £8.585 million recoupment for academy and FE place funding and a £0.631 million contribution from the Early Years Block is estimated at £29.436 million.

	£ million
2019-20 High Needs Allocation	36.642
Additional funding announced December 2018	0.683
Sixth Form Grant	0.067
Total High Needs Funding	37.391
Less Place-led funding for academies and FE recouped by ESFA	-8.585
Plus contribution from Early Years Block	0.631
Available to the Local Authority	29.436

The current pressures and rates of funding mean that there is a forecast accumulated underfunding of £4.2 million as at 31 March 2020, excluding growth and mitigating actions. The underfunding comprises a brought forward balance of £1.474 million from 2018-19 and a projected continuing base pressure of £2.75 million in 2019-20.

The projected base deficit is being driven by significantly increasing numbers of young people needing additional support, along with previous decisions about the level of funding required to meet the needs identified at specific levels that were unrealistic and unsustainable in the longer term. Current figures show that Waltham Forest 'Level 1' funding is over 2 times higher than the average of other neighbouring Local authorities: £3,800, (Islington LA currently funds 'Level 1' at £1,175, whilst Hackney LA currently funds at £4,895).

This was an historic figure, selected many years ago, that does not reflect the current Educational climate, and does not have a specific link to the content of our current Education, Health and Care Plans (EHCPs). Significant work has been undertaken to review current levels, based on the needs identified, and in partnership with schools, to consider the appropriate level of funding required to meet the needs as articulated in current EHCPs.

An accumulated balance of £4.2 million would represent be the equivalent of 11% the High Needs Block and 1.6% of the total DSG. This would breach the ESFA's threshold of 1% of the total DSG and the Local Authority would be required to report to the ESFA on its plans for bringing the DSG back into balance.

In preparation for this requirement the LA is consulting on its plans for allocating High Needs funding in 2020-21, setting a balanced budget and aiming to ensure that the projected accumulated balance is not increased further.

ASSUMPTIONS FOR 2020-21

There is much uncertainty about the financial position in 2020-21: firstly, the outcome of the government's spending review; and secondly, the level of demand growth during 2019-20. For

planning purposes, it is assumed that both funding and the level of need in 2020-21 are the same as that projected for 2019-20.

INCLUSION GROUP

Schools Forum refreshed the membership and terms of reference of the Inclusion Group in December 2018 with the intention of agreeing proposals to allocate the HNB for 2020-21. The group met on 28 January, 13 February, 21 March and 23 April 2019.

The LA's plans for 2020-21 reflect the consensus reached by the Inclusion Group on 23 April 2019.

PROPOSALS

Alternative Provision – Forest Pathways

This provision is particularly expensive, (when compared to other provisions). It is proposed to commission other arrangements for this cohort of students, either through more mainstream settings, or through a new commission which combines Year 11 with a similar provision for Years 12 and 13. This would have the advantage of providing opportunities for current Year 11s to engage in mainstream learning opportunities from a much earlier stage, thereby enhancing their life chances considerably.

Additional changes are taking place across the wider Alternative Provision offer within the Borough. These will be consulted on in a separate process and will also impact on the HNB spend.

SEND Success Outreach Contract and Home Hospital Contracts

The Director of Learning has been negotiating with the Whitefield and Hornbeam special academy trusts through their commissioning groups. Whitefield (SEND Success), and Hornbeam (Home Hospital), have both agreed to provide an amended service offer which protects the quality of current service delivery, but which represents far better value for money for the HNB.

New Resource Ladder

It is proposed that a new, simplified Resource Ladder will be fully operational by April 2020. This has been based on a review of current EHCPs and extensive conversations with school leaders. The new Ladder is similar in design to the previous one, with a layered approach to increasing the funding allocated to meet increased levels of need. However, it is a simplified version, bringing Primary and Secondary together, and using funding amounts that more closely reflect the levels of provision that will be able to meet the needs as identified within the EHCPs. It is anticipated that young people in mainstream settings and special resource provision currently in receipt of 'top-up' funding will be assimilated onto the new Ladder on 1 April 2020.

The proposed ladder is as follows:

Level 1 (current Band E)	£5,000
Level 2 (current Band F and G)	£15,000
Level 3 (current Band H)	£21,000
Level 4 (current Band I)	£43,000

This will be introduced from September 2019 and will form the basis for the allocation of top-up funding. However, mainstream schools and special resource provision will receive 100% transitional relief until 31 March 2020. Special schools receive on-going protection under the special schools

minimum funding guarantee which limits any reductions to their total budget (i.e. including place-led funding) to 1.5% per year.

Transfer from the Schools Block

It is proposed that Schools Forum should agree to a request for a 0.15% transfer (£298,000) from the Schools Block to the High Needs Block. This is intended to support the 'Inclusive' approach taken by the Borough and its schools, based on the premise that 'ALL' schools have a shared ownership for SEND pupils across the Borough, regardless of how many are in any one specific school.

CONSULTATION TO DATE

In addition to the Inclusion Group meetings, the Director of Learning has met with governors, schools and parent group over the past four months:

Inclusion Group meetings: 28 January, 13 February, 21 March and 23 April 2019.

SEND Parent Forum: 28 November, 29 April.

Governors briefing: 11 February, 8 May.

There will be further SEND Parent Consultation meetings and a Headteacher Consultation event: tbc

Schools Forum has been consulted on these plans at an extraordinary meeting on Tuesday 14 May and agreed this consultation document for a wider consultation including all schools, parent groups and governors. This wider consultation will run from 15 May to 12 June and the results of the wider consultation will be presented to Schools Forum at a second extraordinary meeting on Wednesday 19 June 2019.

APPENDICES

Please see attached Appendices:

1. Additional Information
2. High Needs Budget Summary 2018-19 to 2020-21
3. Illustration of proposed Levels 1 and 2
4. Illustration of Schools Block transfer

CONSULTATION DETAILS

Schools are asked to comment on the proposals contained within this document and to also comment on the proposal for the planned spending of the HNB for the period April 2020 to March 2021.

Please send your responses to EducationFinance@walthamforest.gov.uk by 5pm on 12 June 2019.

David Kilgallon, Director of Learning and System Leadership

Tel 020 8496 3504 david.kilgallon@walthamforest.gov.uk

ADDITIONAL INFORMATION

Alternative Provision

The LA has convened three workshops to consider Alternative Provision: on 6 December 2018, 4 April and 30 April 2019. The outcome of these workshops will be presented in a report and consultation document later during the Summer term 2019.

Forest Pathways

Forest Pathways specialises in working with year 11 students who have arrived in the country during Year 11 of their education. Many of these require some extra help with their English (in some cases learning to read and write from scratch), as well as Maths and/or with completing their GCSEs in 1 year with additional language support.

Forest Pathways is funded at £22,000 per place currently which is a significant premium above other forms of alternative provision.

Details are provided in the consultation document about proposals specifically relating to Forest Pathways.

Commissioning Groups

The Director of Learning has established commissioning groups to look in detail at the contract for SEND Success outreach with Whitefield; the contract for Home Hospital Tuition with Hornbeam; the Alternative Provision contract with the Hawkswood Group (including Forest Pathways and the PRUs); and the School Resourced Provision across 11 mainstream schools (various SEND provisions).

The commissioning groups comprise officers from the LA's commissioning team; Education Finance; the Director of Learning and Systems Leadership; and the Disability Enablement Service (DES) for special educational need provisions or the Behaviour, Attendance and Children Missing Education service (BACME) for pupil referral units and alternative provision. These groups consider both educational outcomes for students and value for money issues. The minimum arrangement is for an annual meeting with each provider, but may be more regular if, and where, appropriate. These new commissioning arrangements will culminate in an annual report to the Deputy Chief Executive and to Schools Forum.

SEN Financial Strategy and Policy Document

The Director of Learning has established a working group of officers to co-ordinate work streams relating to High Needs funding and to agree a financial policy document. The document will set out the LA's operational policies, such as arrangements for nursery provision and not automatically providing additional place-led funding when making a "spot purchase" above the formal number of commissioned places.

Call for Evidence and Spending Review

The Department for Education (DfE) has issued a call for evidence on Provision for children and young people with special educational needs and disabilities, and for those who need alternative provision: how the financial arrangements work. In addition to seeking views on Special Educational Needs and Disability (SEND) financing, the call seeks views on the increasing number of children attending Alternative Provision (AP) and the consequent pressure on the High Needs Block for financing this provision. NB: The DfE is not seeking evidence on the shortfall, or otherwise, in the volume of funding which is a matter for the forthcoming spending review.

<https://consult.education.gov.uk/funding-policy-unit/funding-for-send-and-those-who-need-ap-call-for-ev/>

Officers will be participating in the call for evidence and are working with London Councils, the Society of London Treasurers and the Local Government Association (LGA) to influence the forthcoming spending review. Officers are also attending meetings with the Ministry of Housing, Communities and Local Government (MHCLG).

Top Up Funding (Element 3): Extracts from ESFA High needs funding 2019 to 2020 Operational Guide, September 2018

79. Top-up funding is the funding required, over and above the core funding an institution receives, to enable a pupil or student with high needs to participate in education and learning. This is paid by the local authority which places the pupil or student and should reflect the costs of additional support to meet the individual pupil or student's needs. Top-up funding can also reflect costs that relate to the facilities required to support a pupil's or student's education and training needs (either for individuals or on offer to all) and can take into account expected place occupancy levels and other factors.

81. Local authorities bear the ultimate responsibility for decisions on top-up funding, as they are accountable for spending from their high needs budgets. In all instances, pupils or students with an EHC plan must have their placement commissioned by a local authority and an agreement should be in place between the local authority and the institution that confirms the amount of top-up funding to be paid (as set out below). Even where provision is specified in an EHC plan, there is no statutory requirement that a local authority has to pay top-up funding at a particular rate requested by a school or institution.

88. As part of their discussions on how high needs funding is used, local authorities should work with institutions that have pupils or students with high needs to ensure there are clear processes for determining and allocating top-up funding. This should include agreeing what additional needs mainstream schools and colleges should meet from their own resources (taking account of any additional support or funding provided centrally) and where top-up funding might be provided. This information should be published as part of the local offer of SEND services and provision.

91. Many local authorities have systems which indicate the range of top-up funding which might be provided for children and young people with a particular complexity of need (sometimes referred to as 'banded' funding systems). This can be helpful in providing clear and transparent funding arrangements for many types of need that may be met in a range of different institutions. Where a local authority makes a large number of placements at an institution or range of institutions, a system for the local authority and institutions to agree levels of top-up funding in advance can be a very efficient way of allocating this funding. However, the final allocation of funding must be sufficient to secure the agreed provision specified in any EHC plan.

93. The extent to which local authorities and institutions agree on standardised rates, local banding arrangements and streamlined administration to reduce the need for detailed negotiation of different top-up funding amounts for each pupil or student. We would support approaches that both create certainty for institutions on the level of funding they can expect to receive for the provision they make, and are sufficiently responsive to changes in the number and needs of the pupils and students being placed in the provision.

Current Resource Ladder

CURRENT RESOURCE LADDER						
	BOTTOM		MID			TOP
	WHITEFIELD	PRIMARY	SRP	SECONDARY	HORNBEAM & JOSEPH CLARK	BELMONT PARK
D	13,500				14,500	17,500
E	18,000	18,000	19,000	19,000	19,000	22,000
F	24,750	24,750	25,750	25,750	25,750	28,750
G	27,500	27,500	28,500	28,500	28,500	31,500
H	31,250				32,250	35,250
I	53,000				54,000	57,000
*HORNBEAM COMBINES FORMER BROOKFIELD HOUSE AND WILLIAM MORRIS						

There are significant anomalies in the current Resource Ladder (which dates from 2013-14) which does not ensure that resources are being targeted appropriately. The Resource Ladder expresses the total value and includes (for mainstream schools) Element 2 and Element 3 funding from schools' own resources.

There are three bands in the current Resource Ladder: secondary schools are in the mid band while primaries are in the bottom band. The rationale was that the secondary AWPU (element 1) is around £1,000 more than the primary AWPU. This does not reflect any special need, but rather it assumes that the higher AWPU for Key Stage 3 and 4 is required for all secondary pupils and is pass-ported into high needs support.

Places in special schools and SRPs are allocated funding irrespective of age so it seems inequitable to set the mainstream secondary rate to capture the key stage driven element 1. Secondary schools bear the cost of the higher rate as they are expected to contribute more, leading to a lower top-up rate.

As the extra £1,000 is a fixed amount at each level, it has an inverse relationship to need. The £1,000 at Level E is a 5.6% uplift at Level E but only a 3.6% uplift at Level G.

	Top Up	Element 1 (AWPU)	Element 2 (Notional SEN)	School Contribution	Level E
	£	£	£	£	£
Primary	8,455	3,545	6,000	9,545	18,000
Secondary	8,175	4,825	6,000	10,825	19,000
Difference	-280	1,280	0	1,280	1,000

*Table above shows 2018-19 AWPU

For special schools, the funding bands were set to reflect the size of the settings with Whitefield on the bottom band; Brookfield House, Joseph Clarke and William Morris on the mid band (£1,000 higher); and Belmont Park on the top band (£4,000 higher).

The difference between the bands is a version of place-led funding, topping-up settings above the standard £10,000 per place to £11,000 (mid) or £14,000 (top). As these amounts are fixed they have an inverse relationship to the level of need. For example £4,000 extra for Level E on the high band compared to the bottom band is an uplift of 29.6%, while £4,000 extra for Level I is only an uplift of 7.5%.

The number of places in each setting has increased since the Resource Ladder was introduced, with the exception of Belmont Park. In addition to growing individually, special schools have joined together in multi-academy trusts: in April 2014, Whitefield Schools and Centre and its partner school, Joseph Clarke School, joined together to become Whitefield Academy Trust (438 places); and in 2015, William Morris School and Brookfield House School joined together as the Hornbeam Academy Trust.

The Hornbeam Academy Trust includes two other schools in Havering: Dycorts School (87 places); and Ravensbourne School (86 places); and is working with Essex County Council on establishing a new school in Harlow, Essex. The Hornbeam MAT including the out-borough schools is nearly twice the size of the original two schools. Whitefield MAT is 41 places (10%) larger than when the Resource Ladder was established and the Hornbeam MAT is 38 places (18%) larger.

Special Schools places 2013-14 compared to 2017-18

	average FTE across the financial year			
	2013-14	2017-18	change	
Whitefield	316.75	345.00	28.25	9%
Joseph Clarke	80.50	93.40	12.90	16%
Whitefield MAT	397.25	438.40	41.15	10%
Brookfield House	79.25			
William Morris	134.17			
Hornbeam MAT (WF)	213.42	252.10	38.68	18%
Dycorts		87.00		
Ravensbourne		86.00		
Hornbeam MAT		425.10	211.68	99%
Belmont Park	53.17	51.90	-1.27	-2%

Schools Block Transfer

If Schools Forum do not agree to the 0.15% transfer the LA may submit a disapplication request to the DFE by 30 November 2019 asking for the regulations that otherwise ring-fence the Schools Block to be dis-applied. It is by no means certain that the disapplication request would be allowed and the previous request for a transfer of 0.5% was rejected for 2019-20, partly due to the absence of a recovery plan. This will be in place for 2020-21.

The £298,000 (0.15%) that would be transferred from mainstream schools' Schools Block funding represents around 1% of HNB funding. This would be a significant contribution towards assisting a balanced budget while other measures to make High Needs expenditure sustainable are consulted on and agreed.

The LA believes that it would be imprudent not to use the mechanism provided by the DFE to reduce pressure on the HNB and that not doing so would undermine our representations regarding underfunding of High Needs.

Any transfer is a one-off for 2020-21 but LAs that made a transfer to the HNB in 2018-19 were allowed to repeat it in 2019-20 without referring to the DFE if their Schools Forum agrees. Unless significant immediate increases in funding or reductions in expenditure materialise, it is very likely that this measure will need to be rolled forward and repeated into 2021-22.

There have been no previous transfers from the Schools Block to the HNB. There have been transfers from the Early Years Block but these have been ring-fenced to support provision in the early years.

Arguably, there has been a series of one-off transfers from the HNB to the Schools Block: £1.354 million, comprising £854,000 transferred from the HNB reserve to mainstream schools to support the Primary and Secondary Challenges and £500,000 transferred to mainstream schools in 2016-17 for PRU top-up fees; and £2 million for the “Universal Offer” to mitigate the cuts in School Improvement and Early Help budgets, providing support for raising standards and reducing achievement gaps and strengthening the school system, both via collaboration to drive improvement and developing CPD and Leadership.

Additional place-led funding

There has been an expectation that any spot-purchasing of additional places above the number commissioned will attract both top-up funding and additional £10,000 place-led funding. The High Needs Funding Operational guide 2018-19 makes clear in paragraphs 70 and 71 that it should not be assumed that additional place-led funding is automatic:

“How place funding and top-up funding work together

Once the total place funding is allocated to an institution, it’s for the institution to decide how best to apportion this core funding, across the actual number of places commissioned by local authorities irrespective of the local authority in which a child resides, in line with the principles set out above.....

Once it has been agreed to place a pupil or student in an institution, the commissioning local authority then agrees an amount of top-up funding for the individual pupil or student over and above the place funding to make up the full cost, bearing in mind the provision and support that may be specified in each individual pupil or student’s EHC plan.”

What are the Pressures?

The pressures on the HNB are demand-led, predominately a new burden resulting from the implementation of the Children and Families Act 2014.

A recent survey by ALDCS and the Society of London Treasurers found that the cumulative High Needs deficit is now nearly £70m across London and 2018-19 projections show that this trend will continue. The number of children and young people with an Education Health and Care Plan (EHCP) has risen significantly across England since 2015 and risen disproportionately in London. All boroughs are now recording a shortfall in High Needs funding.

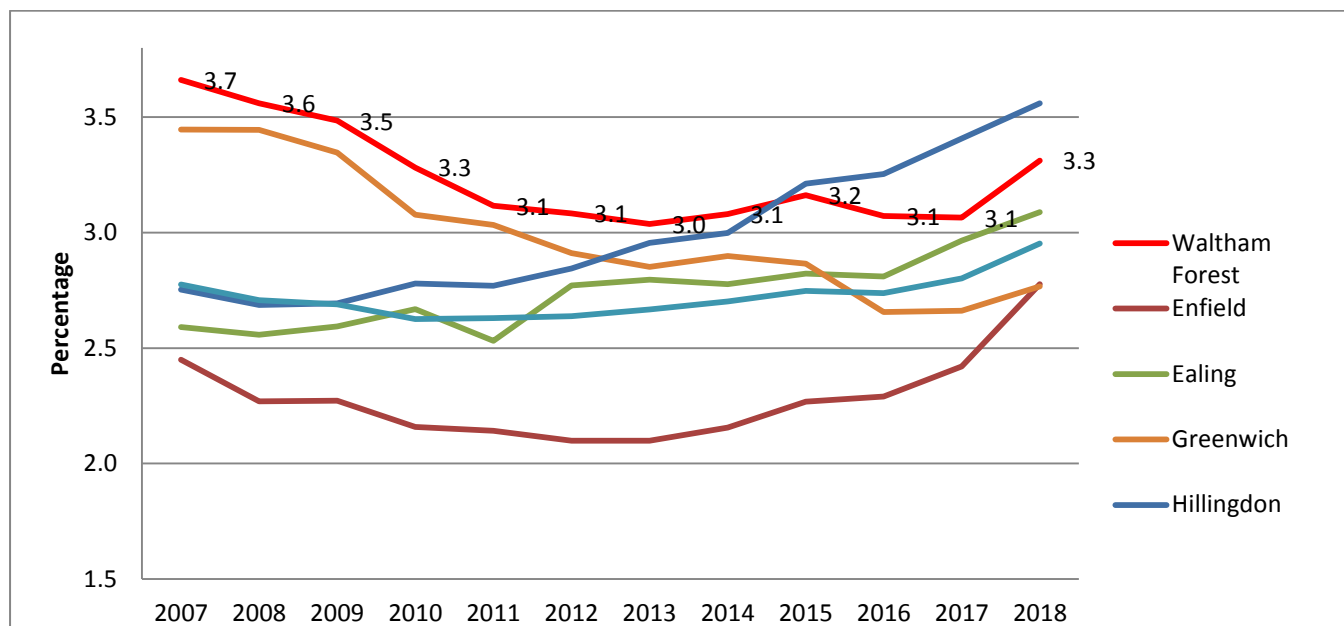
The unfunded pressure on the HNB is acute in Waltham Forest where the percentage of pupils with EHCPs, 3.3%, is above both the Outer London and Inner London average. The number of EHCPs has grown 20% between January 2017 and January 2018 (11.3% nationally), driven by large increases in

the 16-19 and 20-25 age groups. Since 2017, the number of Level E EHCPs (£18,000 a year) has grown by 25% to 433 and Level F EHCPs (£25,000 a year) has grown 25% to 865.

There has been a 12% increase in special school places 2013-14 to 2017-18.

The chart below shows the percentage of pupils in Waltham Forest schools with an Education, Health and Care Plan (EHCP). The chart compares the proportion for Waltham Forest against some of its statistical neighbours.

Table 1: Percentage of pupils with an EHCP in Waltham Forest schools as a proportion of pupil population



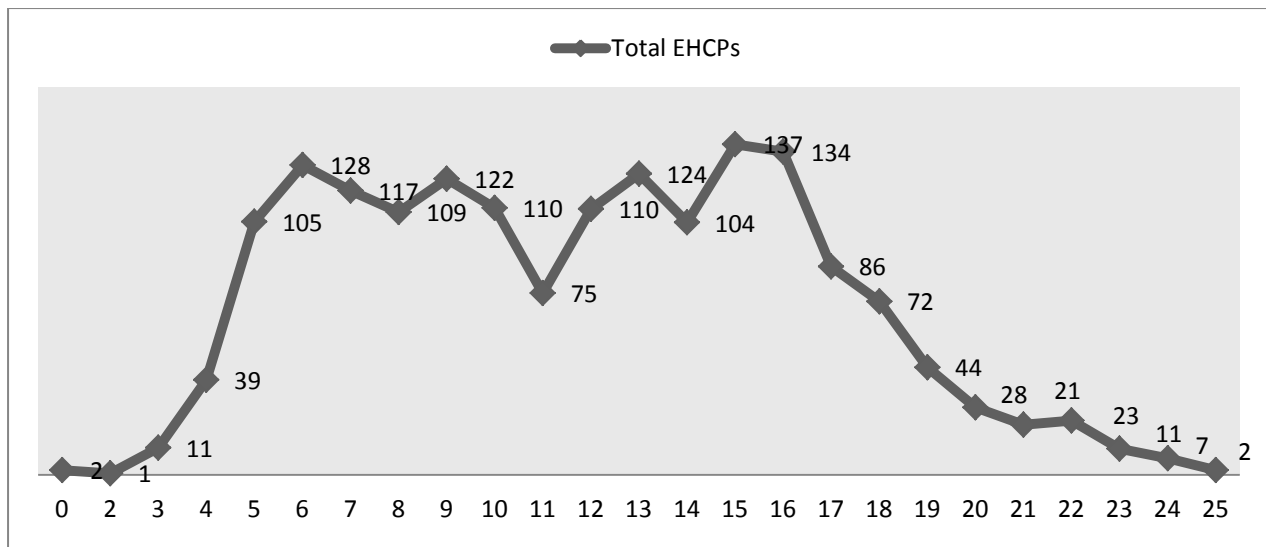
The chart illustrates that Waltham Forest has a high proportion of pupils with EHCPs. The proportion is greater than that of Outer London and its statistical neighbours. In the year to January 2018, there is a sharp rise in the number of EHCPs as a proportion of pupil population.

The Disability Enablement Service (DES) will evaluate and attempt to understand the reasons why LBWF has above average level of EHCPs. In their finding an assessment will need to be made about whether a change in practice is needed or not.

The Children and Families (CAF) Act 2014 has now been in place for 4 years. The additional post 16 and post 19 pupil growth that resulted from the implementation of the CAF 2014 is now starting to top-out because the first group of post 19 pupils would be aging out now. **Table 2** shows the number of pupils above the age of 16 tapering off at 20 years old.

At 19 years old, there are 44 pupils with an EHCP but by 23 years old there are only 11. By 25 years old there are only 2.

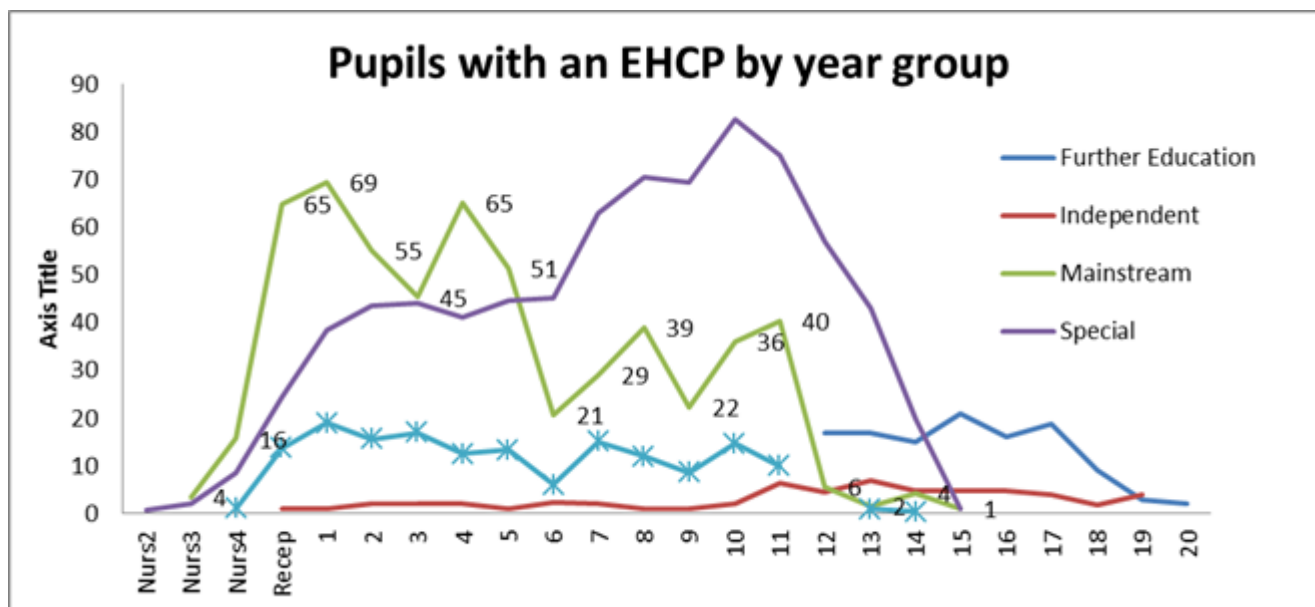
Table 2: Illustrates the number of pupils with an EHCP per age group



Year 6 Transition

The transition from primary to secondary schools is very costly for the HNB. The data shows a decline in pupils in a mainstream setting by nearly 2/3rds between Year 6 and Year 7. Alternatively, special school places increase dramatically from Year 6 to Year 7.

Table 3: Illustrates the number of pupils with an EHCP per age group



Due to the higher demands on the HNB of special school places, the average cost being £25,000 per place compared to £10,000 in a mainstream school this is a very costly phenomenon.

Independent Schools and FE Colleges

Officers have done some analysis to evaluate the average cost per provision and this work will continue.

Independent placements cost only on average £5,000 more than special school placements. LBWF already spends below Outer London and its statistical neighbours on independent placements.

FE college places have an average top-up rate of £10,268 and a total cost including the element 2 funding of £16,268. This is lower than Outer London and the average of our statistical neighbours.

Comparative Spend Analysis

The following table demonstrates that Waltham Forest has relatively low spend on independent special schools and relatively high spend on top-ups.

COMPARATIVE SPEND ANALYSIS					
Per 1000 population 2-18 year olds	Waltham Forest	Outer London	5 closest statistical neighbours	10 closest statistical neighbours	
	£	£	£	£	
Place funding	172	103	149	138	
of which :-					
PRUS	46	24	24	23	
Special Schools	125	78	125	115	
Top ups					
Mainstream, Schools	326	280	252	286	
Independent Specials	42	129	110	111	

Appendix 2 High Needs Budget Summary

		DRAFT: TO BE CONFIRMED				
HIGH NEEDS BUDGET SUMMARY						
Line	Description	School Forum February	Final Outturn 2018-19	Variance from Forum	Projection 2019- 20	Plan 2020-21
		£	£	£	£	£
INCOME						
1	Baseline Funding from Education Funding Agency (EFA)	36,298,714	36,298,714	0	36,641,702	36,642,000
2	Additional Funding from ESFA	682,960	682,960	0	682,960	683,000
3	Deductions for Academy and FE places	-8,533,000	-8,501,499	-31,501	-8,585,833	-8,586,000
	Total HNB Allocation	28,448,674	28,480,175	-31,501	28,738,829	28,739,000
4	6th Form Grant	200,000	221,856	-21,856	66,667	0
5	High Needs Funding Received by LA	28,648,674	28,702,031	-53,357	28,805,496	28,739,000
6	Transfer from the Early Years Block	631,000	633,000	-2,000	631,000	631,000
7	0.15% Transfer from the Schools Block					298,000
8	HIGH NEEDS BLOCK INCOME TOTAL	29,279,674	29,335,031	-55,357	29,436,496	29,668,000
EXPENDITURE						
SPECIAL SCHOOLS						
9	Place Funding	561,667	561,667	0	570,000	570,000
10	Early Years EHC top up funding (Under 5 year old)	208,039	299,257	91,218	208,000	208,000
11	Top-up (5 years and older - 1 Sep 2017)	9,060,907	9,136,338	75,431	9,105,500	8,811,500
12	Early Years SENCO		98,300	98,300		
13	Spot Purchases		0	0	290,000	290,000
	TOTAL SPECIAL SCHOOLS BUDGET	9,830,613	10,095,562	264,949	10,173,500	9,879,500
SPECIAL RESOURCE PROVISION						
14	Place Funding	573,000	573,000	0	567,000	567,000
15	Special Resourced Provisions Top UP	2,400,381	2,389,955	-10,426	2,300,000	2,005,000
16	Spot Purchases		0	0	120,000	120,000
17	TOTAL SRP BUDGET	2,973,381	2,962,955	-10,426	2,987,000	2,692,000
MAINSTREAM SCHOOLS						
18	Top-up : Mainstream schools	6,847,249	6,931,065	83,816	7,534,500	6,675,267
19	SEN Inclusion Fund Top up for Early Years children.	503,600	206,310	-297,290	503,600	503,600
20	TOTAL PVI AND MAINSTREAM SCHOOLS BUDGET	7,350,849	7,137,375	-213,474	8,038,100	7,178,867
POST 16 PROVISION						
21	Place-led funding for further education providers	56,000		-56,000	56,000	56,000
22	Top up fees for further education providers	1,050,000	1,460,353	410,353	1,050,000	1,050,000
23	TOTAL FURTHER EDUCATION BUDGET	1,106,000	1,460,353	354,353	1,106,000	1,106,000
PRUs						
24	Hawkswood PRUs Place Led	860,000	851,667	-8,333	860,000	860,000
25	Hawkswood PRUs Top Up funding	169,000	188,465	19,465	200,000	170,000
	TOTAL PRUs	1,029,000	1,040,132	11,132	1,060,000	1,030,000
ALTERNATIVE PROVISION						
26	Forest Pathways / Year 11 arrivals	1,408,000	1,408,000	0	1,228,333	428,333
27	Alternative Provision via Hawkswood	1,613,153	1,520,000	-93,153	1,000,000	1,000,000
28	South Chingford	25,000		-25,000	100,000	100,000
29	Other Provision				581,667	582,000
	TOTAL ALTERNATIVE PROVISION	3,046,153	2,928,000	-118,153	2,910,000	2,110,333
INDEPENDENT & NM SPECIAL SCHOOLS						
31	Independent & NMSS	3,034,672	3,651,213	616,541	3,120,000	3,120,000
32	Independent & NMSS under 5		29,133	29,133		
33	Placements in OLA schools	451,183		-451,183	410,000	410,000
34	Speech and Language Therapy Service	140,000	140,000	0	140,000	140,000
	TOTAL INDEPENDENT & OTHER LA BUDGET	3,625,855	3,820,346	194,491	3,670,000	3,670,000
SUPPORT AND ASSESSMENT SERVICES						
35	Home Hospital	326,700	326,700	0	326,700	289,700
36	Outreach	906,000	906,000	0	906,000	700,000
37	Disability Enablement Service	610,000	664,000	54,000	610,000	610,000
38	BACME (Social Inclusion)	330,000	324,100	-5,900	330,000	330,000
39	FAP Payments to schools for admitting exc pupils	71,600	37,000	-34,600	71,600	71,600
	TOTAL ASSESSMENT SERVICES	2,244,300	2,257,800	13,500	2,244,300	2,001,300
	HIGH NEEDS TOTAL PROJECTED SPEND	31,206,151	31,702,522	496,371	32,188,900	29,668,000
	In Year Surplus (-) / Deficit +	1,926,477	2,367,491	441,014	2,752,404	0
40	Reserve B/f	-893,000	-893,000	0		
41	Deficit B/f				1,474,491	4,226,895
42	Deficit C/f	1,033,477	1,474,491	441,014	4,226,895	4,226,895

Appendix 3

ILLUSTRATION OF PROPOSED NEW LEVEL 1 AND 2 TOP UPS												
LEVEL	FTES as at 31 March 2019			CURRENT RESOURCE LADDER				PROPOSED RESOURCE LADDER			CHANGE	
	E	F	G	E	F	G	TOTAL	1	2	TOTAL		
PRIMARY				£8,427	£15,177	£17,927		£5,000	£15,000			
ALL THROUGH				£7,137	£13,887	£16,637						
SECONDARY				£8,137	£14,887	£17,637						
SRP				£9,000	£15,750	£18,500						
PRU				£9,000	£15,750	£18,500						
PRIMARY												
Ainslie Wood Primary School		5		£0	£75,885	£0	£75,885	£0	£75,000	£75,000	£-885	
Barclay Primary School	5	9		£42,135	£136,593	£0	£178,728	£25,000	£135,000	£160,000	£-18,728	
Barn Croft Primary School	1	3		£8,427	£45,531	£0	£53,958	£5,000	£45,000	£50,000	£-3,958	
Chapel End Infant School and Early Years Centre	2	4	1	£16,854	£60,708	£17,927	£95,489	£10,000	£75,000	£85,000	£-10,489	
Chapel End Junior Academy	1	4		£8,427	£60,708	£0	£69,135	£5,000	£60,000	£65,000	£-4,135	
Chase Lane Primary School	4	2		£33,708	£30,354	£0	£64,062	£20,000	£30,000	£50,000	£-14,062	
Chingford CofE Primary School		4		£0	£60,708	£0	£60,708	£0	£60,000	£60,000	£-708	
Chingford Hall Primary School	1	2		£8,427	£30,354	£0	£38,781	£5,000	£30,000	£35,000	£-3,781	
Coppermill Primary School	2	7		£16,854	£106,239	£0	£123,093	£10,000	£105,000	£115,000	£-8,093	
Davies Lane Primary School	4	2	1	£33,708	£30,354	£17,927	£81,989	£20,000	£45,000	£65,000	£-16,989	
Dawlish Primary School	1	2		£8,427	£30,354	£0	£38,781	£5,000	£30,000	£35,000	£-3,781	
Downsell Primary School	7	10		£58,989	£151,770	£0	£210,759	£35,000	£150,000	£185,000	£-25,759	
Edinburgh Primary School	6	4		£50,562	£60,708	£0	£111,270	£30,000	£60,000	£90,000	£-21,270	
Emmanuel Community School	3	1		£25,281	£15,177	£0	£40,458	£15,000	£15,000	£30,000	£-10,458	
George Tomlinson Primary School	2	7	1	£16,854	£106,239	£17,927	£141,020	£10,000	£120,000	£130,000	£-11,020	
Greenleaf Primary School	4	5		£33,708	£75,885	£0	£109,593	£20,000	£75,000	£95,000	£-14,593	
Gwyn Jones Primary School	1	10	1	£8,427	£151,770	£17,927	£178,124	£5,000	£165,000	£170,000	£-8,124	
Handsworth Primary School		4	1	£0	£60,708	£17,927	£78,635	£0	£75,000	£75,000	£-3,635	
Henry Maynard Primary School	2	6		£16,854	£91,062	£0	£107,916	£10,000	£90,000	£100,000	£-7,916	
Hillyfield Primary Academy	9	12		£75,843	£182,124	£0	£257,967	£45,000	£180,000	£225,000	£-32,967	
Larkswood Primary School		4		£0	£60,708	£0	£60,708	£0	£60,000	£60,000	£-708	
Longshaw Primary School	1	4		£8,427	£60,708	£0	£69,135	£5,000	£60,000	£65,000	£-4,135	
Mayville Primary School	2	4		£16,854	£60,708	£0	£77,562	£10,000	£60,000	£70,000	£-7,562	
Mission Grove Primary School	8	10		£67,416	£151,770	£0	£219,186	£40,000	£150,000	£190,000	£-29,186	
Newport School	9	4		£75,843	£60,708	£0	£136,551	£45,000	£60,000	£105,000	£-31,551	
Oakhill Primary School	2			£16,854	£0	£0	£16,854	£10,000	£0	£10,000	£-6,854	
Our Lady and St George's Catholic Primary School	6	9		£50,562	£136,593	£0	£187,155	£30,000	£135,000	£165,000	£-22,155	
Parkside Primary School	2	9		£16,854	£136,593	£0	£153,447	£10,000	£135,000	£145,000	£-8,447	
Riverley Primary School	3	1		£25,281	£15,177	£0	£40,458	£15,000	£15,000	£30,000	£-10,458	
Roger Ascham Primary School	7	5		£58,989	£75,885	£0	£134,874	£35,000	£75,000	£110,000	£-24,874	
Selwyn Primary School	4	8		£33,708	£121,416	£0	£155,124	£20,000	£120,000	£140,000	£-15,124	
South Grove Primary School	1	8		£8,427	£121,416	£0	£129,843	£5,000	£120,000	£125,000	£-4,843	

Appendix 3

ILLUSTRATION OF PROPOSED NEW LEVEL 1 AND 2 TOP UPS												
LEVEL	FTES as at 31 March 2019			CURRENT RESOURCE LADDER				PROPOSED RESOURCE LADDER			CHANGE	
	E	F	G	E	F	G	TOTAL	1	2	TOTAL		
PRIMARY				£8,427	£15,177	£17,927		£5,000	£15,000			
ALL THROUGH				£7,137	£13,887	£16,637						
SECONDARY				£8,137	£14,887	£17,637						
SRP				£9,000	£15,750	£18,500						
PRU				£9,000	£15,750	£18,500						
PRIMARY												
St Joseph's Catholic Infant School		1		£0	£15,177	£0	£15,177	£0	£15,000	£15,000	£-177	
St Joseph's Catholic Junior School	3	1		£25,281	£15,177	£0	£40,458	£15,000	£15,000	£30,000	£-10,458	
St Mary's CofE Primary School	3	3		£25,281	£45,531	£0	£70,812	£15,000	£45,000	£60,000	£-10,812	
St Patrick's Catholic Primary School	1	5		£8,427	£75,885	£0	£84,312	£5,000	£75,000	£80,000	£-4,312	
St Saviour's Church of England Primary School.	1	5		£8,427	£75,885	£0	£84,312	£5,000	£75,000	£80,000	£-4,312	
Stoneydown Park School	4	12		£33,708	£182,124	£0	£215,832	£20,000	£180,000	£200,000	£-15,832	
Sybourn Primary School	3	3		£25,281	£45,531	£0	£70,812	£15,000	£45,000	£60,000	£-10,812	
The Jenny Hammond Primary School	5	3	1	£42,135	£45,531	£17,927	£105,593	£25,000	£60,000	£85,000	£-20,593	
The Winns Primary School	11	5		£92,697	£75,885	£0	£168,582	£55,000	£75,000	£130,000	£-38,582	
The Woodside Primary Academy	4	10		£33,708	£151,770	£0	£185,478	£20,000	£150,000	£170,000	£-15,478	
Thomas Gamuel Primary School	4	1		£33,708	£15,177	£0	£48,885	£20,000	£15,000	£35,000	£-13,885	
Thorpe Hall Primary School		5		£0	£75,885	£0	£75,885	£0	£75,000	£75,000	£-885	
Whitehall Primary School	1	6		£8,427	£91,062	£0	£99,489	£5,000	£90,000	£95,000	£-4,489	
Whittingham Primary Academy	5	1		£42,135	£15,177	£0	£57,312	£25,000	£15,000	£40,000	£-17,312	
Willow Brook Primary School Academy		2		£0	£30,354	£0	£30,354	£0	£30,000	£30,000	£-354	
Yardley Primary School	5	6		£42,135	£91,062	£0	£133,197	£25,000	£90,000	£115,000	£-18,197	
Woodford Green Primary School	2			£16,854	£0	£0	£16,854	£10,000	£0	£10,000	£-6,854	
St Mary's Catholic Primary School		2		£0	£30,354	£0	£30,354	£0	£30,000	£30,000	£-354	
PRIMARY TOTAL	152	240	6	£1,280,904	£3,642,480	£107,562	£5,030,946	£760,000	£3,690,000	£4,450,000	£-580,946	

Appendix 3

ILLUSTRATION OF PROPOSED NEW LEVEL 1 AND 2 TOP UPS											
LEVEL	FTES as at 31 March 2019			CURRENT RESOURCE LADDER				PROPOSED RESOURCE LADDER			CHANGE
	E	F	G	E	F	G	TOTAL	1	2	TOTAL	
PRIMARY				£8,427	£15,177	£17,927					
ALL THROUGH				£7,137	£13,887	£16,637					
SECONDARY				£8,137	£14,887	£17,637		£5,000	£15,000		
SRP				£9,000	£15,750	£18,500					
PRU				£9,000	£15,750	£18,500					
SECONDARY											
Chingford Foundation School	16	3		£130,192	£44,661	£0	£174,853	£80,000	£45,000	£125,000	£-49,853
Connaught School for Girls		3	1	£0	£44,661	£17,637	£62,298	£0	£60,000	£60,000	£-2,298
Eden Girls' School Waltham Forest	2	2		£16,274	£29,774	£0	£46,048	£10,000	£30,000	£40,000	£-6,048
Frederick Bremer School	8	6		£65,096	£89,322	£0	£154,418	£40,000	£90,000	£130,000	£-24,418
Heathcote School	7	6		£56,959	£89,322	£0	£146,281	£35,000	£90,000	£125,000	£-21,281
Highams Park School	5	1		£42,135	£15,177	£0	£57,312	£25,000	£15,000	£40,000	£-17,312
Holy Family Catholic School	5	6		£40,685	£89,322	£0	£130,007	£25,000	£90,000	£115,000	£-15,007
Kelmscott School	2	2		£16,274	£29,774	£0	£46,048	£10,000	£30,000	£40,000	£-6,048
Lammas School and Sixth Form	3	3		£24,411	£44,661	£0	£69,072	£15,000	£45,000	£60,000	£-9,072
Leytonstone School	1	3		£8,137	£44,661	£0	£52,798	£5,000	£45,000	£50,000	£-2,798
Norlington School and 6th Form	4	4		£33,708	£60,708	£0	£94,416	£20,000	£60,000	£80,000	£-14,416
South Chingford Foundation School	4	2		£33,708	£30,354	£0	£64,062	£20,000	£30,000	£50,000	£-14,062
Walthamstow Academy	9	4		£73,233	£59,548	£0	£132,781	£45,000	£60,000	£105,000	£-27,781
Walthamstow School for Girls	4	1		£32,548	£14,887	£0	£47,435	£20,000	£15,000	£35,000	£-12,435
Willowfield School	11	7		£89,507	£104,209	£0	£193,716	£55,000	£105,000	£160,000	£-33,716
SECONDARY TOTAL	81	53	1	£662,867	£791,041	£17,637	£1,471,545	£405,000	£810,000	£1,215,000	£-256,545
ALL THROUGH											
Buxton School	9	7	1	£64,233	£97,209	£17,927	£179,369	£45,000	£120,000	£165,000	£-14,369
George Mitchell School	3	6	2	£21,411	£83,322	£33,274	£138,007	£15,000	£120,000	£135,000	£-3,007
ALL THROUGH TOTAL	12	13	3	£85,644	£180,531	£51,201	£317,376	£60,000	£240,000	£300,000	£-17,376
PRU											
Hawkswood Primary PRU	2	4		£18,000	£63,000	£0	£81,000	£10,000	£60,000	£70,000	£-11,000
Hawkswood Secondary PRU	5	2		£45,000	£31,500	£0	£76,500	£25,000	£30,000	£55,000	£-21,500
PRU TOTAL	7	6	0	£63,000	£94,500	£0	£157,500	£35,000	£90,000	£125,000	£-32,500

Appendix 3

ILLUSTRATION OF PROPOSED NEW LEVEL 1 AND 2 TOP UPS												
LEVEL	FTES as at 31 March 2019			CURRENT RESOURCE LADDER				PROPOSED RESOURCE LADDER			CHANGE	
	E	F	G	E	F	G	TOTAL	1	2	TOTAL		
PRIMARY				£8,427	£15,177	£17,927		£5,000	£15,000			
ALL THROUGH				£7,137	£13,887	£16,637						
SECONDARY				£8,137	£14,887	£17,637						
SRP				£9,000	£15,750	£18,500						
PRU				£9,000	£15,750	£18,500						
SPECIAL RESOURCE PROVISION												
Buxton School - SRP	8	8		£72,000	£126,000	£0	£198,000	£40,000	£120,000	£160,000	-£38,000	
Chingford Foundation School - SRP	16	10		£144,000	£157,500	£0	£301,500	£80,000	£150,000	£230,000	-£71,500	
Davies Lane Primary School - SRP	1	26		£9,000	£409,500	£0	£418,500	£5,000	£390,000	£395,000	-£23,500	
Frederick Bremer School - SRP	3	22		£27,000	£346,500	£0	£373,500	£15,000	£330,000	£345,000	-£28,500	
Highams Park School - SRP	1			£9,000	£0	£0	£9,000	£5,000	£0	£5,000	-£4,000	
Hillyfield Primary Academy - SRP	2	16	1	£18,000	£252,000	£18,500	£288,500	£10,000	£255,000	£265,000	-£23,500	
Oakhill Primary School - SRP	2	1		£18,000	£15,750	£0	£33,750	£10,000	£15,000	£25,000	-£8,750	
South Grove Primary School - SRP		15		£0	£236,250	£0	£236,250	£0	£225,000	£225,000	-£11,250	
The Woodside Primary Academy - SRP		22		£0	£346,500	£0	£346,500	£0	£330,000	£330,000	-£16,500	
Whitehall Primary School - SRP	13	3		£117,000	£47,250	£0	£164,250	£65,000	£45,000	£110,000	-£54,250	
Heathcote School - SRP	3	4		£27,000	£63,000	£0	£90,000	£15,000	£60,000	£75,000	-£15,000	
SPECIAL RESOURCE PROVISION TOTAL	49	127	1	£441,000	£2,000,250	£18,500	£2,459,750	£245,000	£1,920,000	£2,165,000	-£294,750	
SUMMARY												
PRIMARY	152	240	6	£1,280,904	£3,642,480	£107,562	£5,030,946	£760,000	£3,690,000	£4,450,000	-£580,946	
SECONDARY	81	53	1	£662,867	£791,041	£17,637	£1,471,545	£405,000	£810,000	£1,215,000	-£256,545	
ALL THROUGH	12	13	3	£85,644	£180,531	£51,201	£317,376	£60,000	£240,000	£300,000	-£17,376	
PRU	7	6	0	£63,000	£94,500	£0	£157,500	£35,000	£90,000	£125,000	-£32,500	
SRP	49	127	1	£441,000	£2,000,250	£18,500	£2,459,750	£245,000	£1,920,000	£2,165,000	-£294,750	
GRAND TOTAL	301	439	11	£2,533,415	£6,708,802	£194,900	£9,437,117	£1,505,000	£6,750,000	£8,255,000	-£1,182,117	

ILLUSTRATION OF SCHOOLS BLOCK TRANSFER		
School Name	19-20 Post MFG Budget	0.15%
	£198,693,473	£298,040.21
Chase Lane Primary School	£3,179,810.61	£4,769.72
Whitehall Primary School	£1,920,273.51	£2,880.41
Downsell Primary School	£2,838,987.00	£4,258.48
Newport School	£3,461,993.28	£5,192.99
Chapel End Infant School and Early Years Centre	£1,201,868.50	£1,802.80
Edinburgh Primary School	£2,445,590.35	£3,668.39
Greenleaf Primary School	£1,845,596.86	£2,768.40
Handsworth Primary School	£1,755,800.25	£2,633.70
Thorpe Hall Primary School	£1,984,392.51	£2,976.59
The Winns Primary School	£3,315,018.50	£4,972.53
Woodford Green Primary School	£902,494.23	£1,353.74
Oakhill Primary School	£1,017,597.18	£1,526.40
Henry Maynard Primary School	£3,534,400.36	£5,301.60
South Grove Primary School	£2,165,145.69	£3,247.72
Dawlish Primary School	£938,252.89	£1,407.38
Gwyn Jones Primary School	£1,738,013.55	£2,607.02
George Tomlinson Primary School	£2,101,722.52	£3,152.58
Mission Grove Primary School	£3,343,407.29	£5,015.11
Coppermill Primary School	£1,179,315.64	£1,768.97
Stoneydown Park School	£2,292,890.16	£3,439.34
Parkside Primary School	£2,459,008.42	£3,688.51
The Jenny Hammond Primary School	£1,446,146.32	£2,169.22
Ainslie Wood Primary School	£1,858,029.30	£2,787.04
Barn Croft Primary School	£995,305.03	£1,492.96
Chingford CofE Primary School	£1,742,995.00	£2,614.49
St Mary's Catholic Primary School	£949,890.90	£1,424.84
St Joseph's Catholic Junior School	£971,456.94	£1,457.19
St Joseph's Catholic Infant School	£741,292.57	£1,111.94
Our Lady and St George's Catholic Primary School	£1,812,484.27	£2,718.73
St Patrick's Catholic Primary School	£1,845,850.80	£2,768.78
Frederick Bremer School	£6,026,905.05	£9,040.36
Heathcote School & Science College	£6,124,670.85	£9,187.01
Willowfield School	£5,520,888.17	£8,281.33
Leytonstone School	£5,063,522.66	£7,595.28
Walthamstow School for Girls	£5,471,318.99	£8,206.98
Kelmscott School	£5,306,276.15	£7,959.41
Holy Family Catholic School	£5,790,822.23	£8,686.23
Buxton School	£7,525,679.09	£11,288.52
Lime Academy Larkwood	£2,907,963.48	£4,361.95
Yardley Primary School	£1,878,948.61	£2,818.42
Davies Lane Primary School	£3,503,087.90	£5,254.63
Hillyfield Primary Academy	£5,700,609.82	£8,550.91
Emmanuel Community School	£932,857.63	£1,399.29
Willow Brook Primary School Academy	£2,396,022.56	£3,594.03
The Woodside Primary Academy	£4,653,522.77	£6,980.28
Chapel End Junior Academy	£1,562,904.21	£2,344.36
Riverley Primary School	£2,054,486.43	£3,081.73

ILLUSTRATION OF SCHOOLS BLOCK TRANSFER		
School Name	19-20 Post MFG Budget	0.15%
Sybourn Primary School	£2,445,525.71	£3,668.29
Thomas Gamuel Primary School	£1,667,065.10	£2,500.60
Walthamstow Primary Academy	£591,879.60	£887.82
Longshaw Primary School	£1,451,014.38	£2,176.52
Roger Ascham Primary School	£2,003,984.78	£3,005.98
Chingford Hall Primary School	£1,574,746.11	£2,362.12
Whittingham Primary Academy	£1,831,867.54	£2,747.80
Mayville Primary School	£1,669,348.45	£2,504.02
St Saviour's Church of England Primary School	£1,524,467.10	£2,286.70
St Mary's CofE Primary School	£2,432,561.14	£3,648.84
Barclay Primary School	£4,988,862.88	£7,483.29
Selwyn Primary School	£2,543,186.76	£3,814.78
South Chingford Foundation School	£3,346,163.52	£5,019.25
Eden Girls' School Waltham Forest	£3,387,687.31	£5,081.53
Connaught School for Girls	£3,730,281.26	£5,595.42
Norlington School and 6th Form	£3,836,591.44	£5,754.89
Highams Park School	£6,739,707.52	£10,109.56
Chingford Foundation School	£7,225,037.59	£10,837.56
Walthamstow Academy	£5,530,583.16	£8,295.87
Lammas School and Sixth Form	£4,876,441.61	£7,314.66
George Mitchell School	£4,890,952.53	£7,336.43