



Schools Forum

**Wednesday, 19 January 2022 4.00 p.m.
To be held remotely**

A handwritten signature in black ink, appearing to read 'David W R', written over a grey rectangular background.

Chief Executive

*Please contact Ann Jones - Tel: 0151 511 8276 or email:
ann.jones@halton.gov.uk for further information.
The next meeting of the Committee is on Wednesday, 16 February 2022*

**ITEMS TO BE DEALT WITH
IN THE PRESENCE OF THE PRESS AND PUBLIC**

Part I

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In accordance with the Health and Safety at Work Act the Council is required to notify those attending meetings of the fire evacuation procedures. A copy has previously been circulated to Members and instructions are located in all rooms within the Civic block.

SCHOOLS FORUM

At a meeting of the Schools Forum on Wednesday, 13 October 2021 held remotely

Present: Councillor T. McInerney (Observer)
 N. Raine, ESFA (Observer)
 A. Jones, Democratic Services, HBC
 A. Jones, Financial Management, HBC
 N Shafiq, Financial Management, HBC
 R. Sprigings, Financial Management, HBC
 A. Leach, Education, Inclusion & Provision
 M. West, Education, Inclusion & Provision, HBC
 K. Landrum, (Chair) Primary School with a Nursery Representative
 A. Brown, Nursery Schools Representative
 T. Bell, 16-19 Provision Representative
 J. Coughlan, Primary Representative - Infant School
 N. Hunt, Pupil Referral Unit Representative
 J. Wilson, Secondary Governor Representative
 A. Sheppard, VA Schools Representative
 J. McConville, Secondary Academy Representative
 I. Critchley, All Through Schools Representative
 L. Roberts, Small Primary Representative
 C. Dalton, Secondary Academies Representative
 C. Ogden, Community Special Schools Representative (Sub)

Action

SCF7 APOLOGIES FOR ABSENCE

Apologies were received from Jane O'Connor, Elaine Haver and Heather Austin (substitute representative sent).

SCF8 MINUTES

The minutes of the meeting held on 16 June 2021 were agreed as a correct record.

SCF9 DSG FUNDING FOR 2022/23

The Forum received the Dedicated Schools Grant (DSG) provisional funding for 2022-23.

It was reported that the DSG was announced on 19 July 2021 and gave Halton a total of £125,445,437 for the Schools Block, Central Schools Services Block (CSSB) and High Needs Block, for 2022-23.

The report presented details of the allocations for the above Blocks whilst the Early Years Block provisional settlement for 2022-23 would be announced in December. It was noted that the individual budgets to be funded from the

CSSB for 2022-23 would be presented at the January meeting of the Forum. The individual High Needs Block budgets would be presented at the February meeting as in previous years; this would allow time for the budgets to be calculated following a separate consultation to consider a transfer from the Schools Block to the High Needs Block, to support the pressure on the High Needs budgets, for reasons outlined in the report.

Representatives were advised that a consultation on the Schools Block funding formula to be used in Halton for 2022-23, was issued early September. This was attached at Appendix A and the responses to this could be found in Appendix B. The Chair commented that the low number of schools that had responded to the consultation was disappointing.

It was noted that all schools who did respond were in agreement with the continuation of following the National Funding Formula (NFF) funding factors and criteria. The respondents to the consultation were also in agreement with the Minimum Funding Guarantee (MFG) being set at the January meeting, for the reasons stated.

Forum representatives agreed with the consultation respondents in supporting the continuation of the NFF methods. They also agreed that a decision on the level of MFG to be applied would be made at the January meeting.

RESOLVED: That Schools Forum

- 1) notes the report;
- 2) supports the continuation of the National Funding Formula methods, principles and rules for mainstream primary and secondary school funding allocations for 2022-23; and
- 3) agrees to make a decision on the level of Minimum Funding Guarantee (MFG) to be applied to the Schools Block funding formula for 2022-23, at the January meeting.

SCF10 DSG FORECAST OUTTURN 2021/22

The Forum received the Dedicated Schools Grant (DSG) forecast outturn for 2021-22.

The report presented commentary on the DSG allocation of £130,991,359 and how this was broken down

into the four blocks – Schools Block, Central Schools Services Block (CSSB), Early Years Block and High Needs Block.

Representatives were referred to Appendix A to the report, which presented the budget lines for each block in detail and their respective totals.

The overall position was a forecast in-year deficit of £1,193,032, with a cumulative forecast deficit of £2,188,774.

The Forum discussed the following in relation to the ongoing pressures and challenges faced with the high needs block:

- Halton has a disproportionately higher than the national average number of children requiring special schools;
- The use of the Educational Psychologists' service was hampered slightly by the pandemic so could not be used to its full potential;
- The numbers of children leaving the Borough for specialist education was predicted to grow but LA officers were looking to identify a range of solutions to retain pupils in-borough wherever possible;
- The DfE delay in progression of the SEMH Secondary Free School build was impacting upon LA spend within the high needs block, and would continue to impact financially with a requirement for alternative specialist provision placements;
- The Authority was limited in its capacity to develop new specialist provision either within existing schools or new schools; but continued to work collaboratively with schools and academy trusts to seek resolutions; and
- Discussions had taken place with staff in special schools to see if there was a way of sharing practice and expertise with mainstream schools.

It was commented that the preferred option for the Authority, children and their families, was for Halton children to be educated in Halton schools however, this was continuing to be extremely challenging and the special schools in Halton continued to be under pressure due to the demand for places.

RESOLVED: That the report be noted.

Meeting ended at 4.30 p.m.

SCHOOLS FORUM

At a meeting of the Schools Forum on Wednesday, 3 November 2021 held remotely

Present:

J. O'Connor, PVI Representative
 J. Coughlan, Primary Representative - Infant School
 J. Wilson, (Vice Chair in the Chair) Secondary Governor Representative
 E. Haver, Academy Special Schools Representative
 A. Sheppard, VA Schools Representative
 J. McConville, Secondary Academy Representative
 H. Austin, Community Special Schools Representative
 I. Critchley, All Through Schools Representative
 L. Roberts, Small Primary Representative
 C. Dalton, Secondary Academies
 C. Liku, Community Nursery Representative
 A. Jones, Democratic Services, HBC
 N Shafiq, Financial Management, HBC
 R. Springings, Financial Management, HBC
 A. Leach, Education, Inclusion & Provision
 M. West, Education, Inclusion & Provision

Action

SCF11 APOLOGIES FOR ABSENCE

Apologies had been received from Karl Landrum, Thalia Bell and Cllr T. McInerney (Observer).

SCF12 SCHOOLS BLOCK TRANSFER TO HIGH NEEDS BLOCK FOR 2022-23

The Forum considered a report of the Operational Director – Finance, which presented the proposal to transfer 1% of the Schools Block of Dedicated Schools Grant (DSG) to the High Needs Block for 2022-23.

As reported at the October meeting of the Forum, a cumulative DSG deficit of £2.1M was forecasted at the end of March 2022; the key areas of overspend were top-up funding and out of borough placements. It was decided therefore to put forward a proposal to transfer 1% of the Schools Block of DSG to the High Needs Block for 2022-23. This would enable some of the deficit balance to be cleared and fund three *Invest to Save* proposals.

The report outlined in detail the rationale behind the proposal and provided representatives with the outcome of the consultation to the proposal, attached at Appendix A. It was noted that out of 64 schools 14 replied, with 6 in support

and 7 against the proposal. Full details of the responses were attached at Appendix B. Ian Critchley commented that he had provided a response to the consultation, but it was not included in the report, this was noted.

In addition to the above, the Forum was advised of the need to submit a further disapplication request to continue the Exceptional Premises Factor, in relation to the Joint Use agreement between Ormiston Bolingbroke Academy and Brookvale Recreation Centre. The School had agreed to the disapplication request so approval was now sought from Schools Forum for this funding to be continued.

In respect of the proposal for the 1% transfer request, a debate took place, with officers responding to questions from representatives. In summary this included the following:

- The alternatives to not allowing the approval of the 1% transfer;
- The overall deficit of £2.1m;
- The expected 8% increase to High Needs budget next year – High Needs provision had seen a 12% increase in demand so there would still be a shortfall as the funding was not increasing as fast as the rate of need;
- Information was provided from a Special School Representative on the increased number of enquiries made to them for places from mainstream primary schools;
- The separation of *Invest to Save* from the 1%;
- Neighbouring profiles of SEND numbers;
- The increasing referral rates to special schools and cost of placements;
- The increasing demands and challenges faced by the Educational Psychologists (EP) service;
- The differing amounts that would be paid – the bigger the school the bigger the cost;
- Post 16 – more information needed as to whether this is included, together with 18-25 – officers to respond after the meeting;
- The DfE benchmarking tool referred to – statistics provided;
- Special schools had lost some facilities for complex needs so were unable to accommodate complex learners, forcing them out of Borough;
- Also, some SEMH students working above level were not able to access mainstream schools;

- LA schools accommodation discussed and efforts to make use of space available in mainstream schools for SEND pupils and the challenges faced with this;
- The *Peopletoo* SEND review and how its recommendations were being incorporated into the SEND Strategy;
- The need for occupancy rates of Halton schools to be part of the Strategy going forward; as some Runcorn schools were well below capacity in recent years due to falling birth rates;
- The proposed SEMH provision in Widnes was put back by the DfE to September 2023 at the earliest;
- The inconclusiveness of the consultation and the fact that only 14 schools responded; and
- The potential for the same request to be submitted to the Forum next year.

The Chair requested representatives to vote on the 1% transfer proposal; the outcome was:

For: 7 votes
Against: 3 votes
Abstain: 1 vote

The Forum agreed to the continuing use of the Exceptional Premises Factor, in relation to Ormiston Bolingbroke Academy.

RESOLVED: That Schools Forum

- 1) note the report;
- 2) agrees to the continuing use of the Exceptional Premises Factor, in relation to Ormiston Bolingbroke Academy; and
- 3) supports the proposal to transfer 1% of the Schools Block Funding from DSG to the High Needs Block, and that the LA progresses this through the appropriate routes within Halton Borough Council before submission of the request to the Department for Education for their consideration.

REPORT TO: Schools Forum
DATE: 19th January 2022
REPORTING OFFICER: Operational Director - Finance
SUBJECT: DSG Forecast Outturn for 2021-22
WARDS: Borough wide

1.0 PURPOSE OF THE REPORT

To report to the Schools Forum the Dedicated Schools Grant forecast outturn for 2021-22.

2.0 RECOMMENDATION: That

2.1 The report is noted.

3.0 SUPPORTING INFORMATION

3.1 Grant settlement

The Dedicated Schools Grant allocation for 2021-22 is £130,991,359 broken down as follows:

Schools Block	£99,050,733
CSSB	£698,973
Early Years Block	£9,862,865
High Needs Block	£21,378,788

Of this, £44,821,323 is recouped from the Schools Block and an estimated £3,050,000 is recouped from the High Needs Block for academies etc.

3.2 Schools Block

No transfer to the High Needs Block was requested for 2021-22 so the full amount of £99,050,733 was devolved to mainstream primary and secondary schools and academies through the funding formula.

3.3 Central Schools Services Block

We are currently forecasting the CSSB to come in over budget by £16,023. The income target for Permanently Excluded pupils is underachieving by approximately £102.7k. The individual budget lines are shown in Appendix A.

3.4 Early Years Block

The Early Years Block is showing as balanced. While we are expecting this block to come under budget in the region of £580k, we are aware that this is only due to a lower number of children accessing this provision. As such, the Department for Education is likely to

recover these underspends next summer so year-end reserves will be required to fund this recovery of grant. Again the individual budget lines are shown in Appendix A.

3.5 High Needs Block

We are currently facing an in-year deficit of £1,509,131 within the High Needs Block. The areas that are overspending are:

	Budget	Forecast	Variance
Top-up funding	£1,872,080	£2,068,851	£196,771 (10.5%)
INMSS	£4,452,830	£5,372,048	£919,218 (20.6%)
Inter Authority	£382,670	£864,746	£482,076 (126.0%)

There are a number of areas forecast to come in under budget, totalling £314.9k however our High Needs Block grant allocation was reduced by £226k by the DfE in March after our budgets had been set. Therefore the rest of the High Needs Block is coming in £88.9k under budget.

3.6 DSG Balances

Therefore the in-year position is a deficit of £1,525,151 plus the deficit balance from 2020-21 of £995,742 to give a cumulative deficit of £2,520,893.

For the last two years we have not requested any transfer from the Schools Block to the High Needs Block. This was to allow the increase in the Schools Block to be passed to schools to allow them to be more inclusive. We have said previously that if costs within the High Needs Block continue to rise we would be requesting a transfer of funds for 2022-23. The disapplication to request a 1% transfer from the Schools Block to the High Needs block was submitted in November and we are awaiting the response from the Department for Education. This equates to £1,013,903 and in accordance with the consultation, the plan is to use £250k to fund three Invest to Save proposals and the balance to reduce the deficit.

4.0 **FINANCIAL IMPLICATIONS**

4.1 Further savings and reducing overspends are essential to getting back to a balanced DSG position.

5.0 **IMPLICATIONS FOR THE COUNCIL'S PRIORITIES**

5.1 **Children & Young People in Halton**

It is essential that schools and education support services receive sufficient funding to allow them to support all children and young people.

5.2 **Employment, Learning & Skills in Halton**

None.

5.3 **A Healthy Halton**

None.

5.4 **A Safer Halton**

None.

5.5 **Halton's Urban Renewal**

None.

6.0 RISK ANALYSIS

6.1 If the transfer from the Schools Block to the High Needs Block is not permitted future year's funding and services from the High Needs Block will face some harsh decisions.

7.0

EQUALITY AND DIVERSITY ISSUES

7.1

The Local Authority must discharge its statutory responsibilities in relation to all schools and settings.

DSG Forecast Outturn for 2021-22

Appendix A

Summary	Original budget	Current budget	Forecast Outturn	Variance	
Schools Block	£ 99,050,733	£ 99,050,733	£ 99,050,733	£ -	
Central Schools Services Block	£ 698,973	£ 698,973	£ 714,996	£ 16,023	
Early Years Block	£ 9,862,865	£ 9,862,865	£ 9,862,862	£ -3	
High Needs Block	£ 18,554,788	£ 18,328,788	£ 19,837,919	£ 1,509,131	
DSG carry forward (central)	-£ 995,742	-£ 995,742	£ -	£ 995,742	
Total DSG	£ 127,171,617	£ 126,945,617	£ 129,466,510	£ 2,520,893	2.21%
Schools Block					
Primary (before de-delegation)	£ 50,660,610	£ 50,660,610	£ 50,660,610	£ -	
Secondary (before de-delegation)	£ 48,390,123	£ 48,390,123	£ 48,390,123	£ -	
Total Schools Block	£ 99,050,733	£ 99,050,733	£ 99,050,733	£ -	
Central Schools Services Block					
Safeguarding post contribution	£ 48,190	£ 48,190	£ 49,207	£ 1,017	
Safeguarding income from schools	-£ 18,050	-£ 18,050	-£ 18,050	£ -	
Licences	£ 116,560	£ 116,560	£ 116,565	-£ 5	
Teachers Panel	£ 19,460	£ 19,460	£ 19,460	£ -	
Premature Retirement costs	£ 501,930	£ 501,930	£ 490,770	£ 11,160	
CSSB Contingency	£ 127,500	£ 127,500	£ 66,034	£ 61,466	
Exclusions Income	-£ 149,040	-£ 149,040	-£ 46,292	-£ 102,748	
Inter Authority Income	-£ 252,890	-£ 252,890	-£ 258,378	£ 5,488	
Staff Responsibilities (de-del)	£ 24,710	£ 24,710	£ 24,710	£ -	
FSM Eligibility contribution (de-del)	£ 6,570	£ 6,570	£ 6,570	£ -	
Dismissals Costs (de-del)	£ 120,900	£ 120,900	£ 120,900	£ -	
Schools Contingency (de-del)	£ 192,590	£ 192,590	£ 192,590	£ -	
DSG Contingency	£ -	£ -	£ -	£ -	
De-delegated income	-£ 344,770	-£ 344,770	-£ 344,770	£ -	
Former ESG Retained Duties					
Revenue budget preparation/Formulation and review of LA schools funding formula	£ 84,140	£ 84,140	£ 84,140	£ -	
Director of children's services/Planning for the education service as a whole	£ 89,610	£ 89,610	£ 80,624	£ 8,986	
Admissions service contribution	£ 9,070	£ 9,070	£ 8,873	£ 197	
SACRE	£ 2,980	£ 2,980	£ 2,980	£ -	
Investigation of Complaints contribution	£ 8,560	£ 8,560	£ 8,560	£ -	
Administrative costs and overheads	£ 110,960	£ 110,960	£ 110,960	£ -	
Former ESG General Duties					
Budgeting and accounting functions relating to m:	£ 22,050	£ 22,050	£ 22,050	£ -	
Asset Management contribution	£ 46,810	£ 46,810	£ 46,353	£ 457	
Health & Safety contribution	£ 61,200	£ 61,200	£ 61,200	£ -	
De-delegated income	-£ 130,060	-£ 130,060	-£ 130,060	£ -	
Total Central Schools Services Block	£ 698,980	£ 698,980	£ 714,996	-£ 16,016	
Early Years Block					
Nursery Schools	£ 1,019,176	£ 1,019,176	£ 1,019,176	£ -	
Nursery Units	£ 392,826	£ 392,826	£ 392,826	£ -	
PVI - 3 & 4 yo provision	£ 6,160,490	£ 6,160,490	£ 5,605,403	£ 555,087	
Early Years Pupil Premium & DAF	£ 190,500	£ 190,500	£ 190,500	£ -	
2 yo provision	£ 1,326,430	£ 1,326,430	£ 1,298,979	£ 27,451	
EYFS Business Rates	£ 24,210	£ 24,210	£ 24,210	£ -	
EY SEN Inclusion Fund	£ 40,000	£ 40,000	£ 49,225	-£ 9,225	
Staffing - 2, 3 & 4 yo provision	£ 168,740	£ 168,740	£ 167,102	£ 1,638	
Supplies & Services - 2, 3 & 4 yo provision	£ 7,000	£ 7,000	£ 1,133	£ 5,867	
Contribution to IWIST	£ 50,000	£ 50,000	£ 50,000	£ -	
EY contingency	£ 483,490	£ 483,490	£ 1,064,308	-£ 580,818	
Total Early Years Block	£ 9,862,862	£ 9,862,862	£ 9,862,862	£ 0	
High Needs Block					
Special Schools & Academies	£ 5,934,886	£ 5,934,886	£ 5,934,886	£ -	
Resource Bases	£ 1,150,461	£ 1,150,461	£ 1,150,461	£ -	
PRU	£ 1,643,271	£ 1,643,271	£ 1,643,271	£ -	
Top-up funding	£ 1,872,080	£ 1,872,080	£ 2,068,851	-£ 196,771	
Special Schools Equipment	£ 20,000	£ 20,000	£ 5,000	£ 15,000	
Specialist Provision:					
Visually Impaired	£ 118,410	£ 93,090	£ 71,988	£ 21,102	
Cognition & Learning	£ 125,240	£ 125,240	£ 124,700	£ 540	
Communication, Language & ASD	£ 106,850	£ 149,890	£ 126,524	£ 23,366	
Hearing Impaired	£ 227,600	£ 227,600	£ 241,575	-£ 13,975	
Home Tuition	£ 300,670	£ 300,670	£ 237,143	£ 63,527	
Education Psychology Service	£ 288,250	£ 288,250	£ 240,191	£ 48,059	
Independent Special Schools	£ 4,452,830	£ 4,452,830	£ 5,372,048	-£ 919,218	

Inter-Authority Recoupment	£	382,670	£	382,670	£	864,746	-£	482,076
Post 16 Provision	£	969,000	£	969,000	£	969,000	£	-
Behaviour Support Team	£	343,700	£	343,700	£	287,445	£	56,255
HN Contingency	£	-	-£	226,000	£	-	-£	226,000
Inclusion Division staffing	£	554,130	£	536,410	£	437,419	£	98,991
Inclusion Division Supplies & Services/SLAs	£	64,740	£	64,740	£	62,670	£	2,070
Total High Needs Block	£	18,554,788	£	18,328,788	£	19,837,919	-£	1,509,131

REPORT TO: Schools Forum
DATE: 19th January 2022
REPORTING OFFICER: Operational Director - Finance
SUBJECT: School Funding for 2022-23
WARDS: Borough wide

1.0 PURPOSE OF THE REPORT

To report to the Schools Forum the Dedicated Schools Grant for 2022-23.

2.0 RECOMMENDATION: That

- 2.1 The report is noted.
- 2.2 The level of Minimum Funding Guarantee to be applied to the Schools Block funding formula for 2022-23 is agreed.
- 2.3 That maintained school representatives decide by phase which de-delegated budgets they agree to fund in 2022-23.

3.0 SUPPORTING INFORMATION

3.1 Grant settlement

The Dedicated Schools Grant allocation for 2022-23 was announced on 20th December at £135,294,589, broken down as follows:

Schools Block	£102,178,425
Central Schools Services Block	£728,189
Early Years Block	£9,355,753
High Needs Block	£23,032,222

This is an overall increase of £4,303,230 compared to the £130,991,359 allocated for 2021-22.

For the first time, the Schools Block will be reduced by the Department for Education by £788,035 due to the change in the way Business Rates costs are handled. Therefore the Schools Block available to allocate through the formula is £101,390,390.

From the allocation for 2022-23, an estimated £3,158,000 will be recouped by the Department for Education from the High Needs Block. This is for academies and other educational establishments for the commissioned High Needs Place funding, reducing the High Needs Block allocation that we receive to £19,874,222.

The Department for Education has also announced Supplementary DSG funding for 2022-23. The schools element of this is estimated at £3,108,481 and the High Needs element is estimated at £864,263. Individual school Supplementary funding allocations will be confirmed by the Department for Education at some point in the Spring Term.

3.2 Pupil Numbers

Pupil numbers in the primary and secondary sectors have increased/decreased overall, details as below:

	2022-23	2021-22	Variance
Primary	10,528	10,668	-140
Secondary	7,707	7,617	+90
Total	18,235	18,285	-50

3.3 Current Position

As in previous years we are still in the process of calculating and checking the individual Schools Block Budgets. These will be issued shortly before the meeting.

After the provisional Schools Block budgets have been shared with Schools Forum at the January meeting we will submit the formula to the Education and Skills Funding Agency for approval. Once this is received we will notify all schools of their confirmed Schools Block budget for 2022-23.

3.4 Transfer of funding to the High Needs Block

We submitted a disapplication request to the Department for Education, to transfer 1% of the Schools Block allocation for 2022-23. At the time of writing we have not yet had a decision.

3.5 Minimum Funding Guarantee

We are required to agree the level of Minimum Funding Guarantee (MFG) to be applied to the Schools Block funding formula for 2022-23. As per the outcome of the consultation with schools, Schools Forum has been given the power to make this decision at the January meeting. For 2022-23 we are able to set the MFG at between plus 0.5% and plus 2.0%. The recommendation for the level of MFG, which depends very much on what we can afford based on the grant settlement, will be issued shortly before the meeting.

3.6 De-delegation

The de-delegated budgets and income sit within the Central Schools Services Block. The proposed budgets are still being finalised and details will be issued shortly before the meeting. We are required to

ask maintained school representatives from the primary and secondary phases to decide on whether they wish to de-delegate these funds for 2022-23.

3.7 Pupil Premium Grant

The Department for Education has set the funding rates as below:

Primary Free School Meal Ever 6 pupil	£1,385
Secondary FSM6	£985
Looked After Children	£2,410
Post-LAC	£2,410
Service Children Ever 6	£320

The allocations to the LA and to individual schools will be announced by the Department for Education during the Spring term.

3.8 Central Schools Services Block budgets for 2022-23

The CSSB allocation for 2022-23 is £728,189. This is an increase of £29,216 to the 2021-22 budget of £698,973.

Alongside the De-delegated budgets we have a number of budgets from the CSSB. A full list with proposed budgets will be issued prior to the meeting as we are still in the process of finalising these budgets.

3.9 Early Years Block budgets for 2022-23

The indicative Early Years Block grant allocation has been issued at £9,355,753. This is a decrease of £507,112 compared to the 2021-22 indicative budget of £9,862,865. This is due to a lower number of full time equivalent children receiving provision; a reduction of 121.26fte for 3&4 year old universal provision and 43.42fte for 3&4 year old additional provision. There is also a reduction of 34.59fte for 2year old provision.

The DfE have issued details of the hourly rates they will pay to LAs and most have seen an increase in rates. However Halton is one of nine LAs whose hourly rate for 3&4 year old provision has stayed at the same level as the current year. Halton has in fact been funded at £5.12 per hour for 3&4 year old provision since April 2019. Funding for 2 year old provision, Early Years Pupil Premium and the Disability Access Fund has increased.

The final Early Years block adjustment for the 2020-21 financial year was issued in November 2021 and reduced our grant allocation by £147,325.

The Early Years funding formula will, as normal, be brought to the February meeting.

3.10 High Needs Block budgets for 2022-23

The High Needs Block allocation for 2022-23 is £23,032,222 less recoupment of £3,158,000 to give £19,874,222. This is an increase of £1,545,434 compared to the 2021-22 allocation of £18,328,788. While this increase is good news, we must still be cautious as the forecast spend for this year for the High Needs Block is £20,791,297. As costs are increasing year-on-year we do not have sufficient to clear the cumulative deficit and fully fund the expected costs for next year.

The detailed budget for 2022-23 is still being finalised and will be brought to the February meeting as normal.

4.0 FINANCIAL IMPLICATIONS

4.1 Further savings and reducing overspends are essential to getting back to a balanced DSG position. Should the 1% transfer of Schools Block funding be refused, the overall deficit position could exceed £3M by the end of March 2023.

5.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES

5.1 Children & Young People in Halton

It is essential that schools and education support services receive sufficient funding to allow them to support all children and young people.

5.2 Employment, Learning & Skills in Halton

None.

5.3 A Healthy Halton

None.

5.4 A Safer Halton

None.

5.5 Halton's Urban Renewal

None.

6.0 RISK ANALYSIS

6.1 We need to comply with the regulations otherwise could have formula imposed on us.

7.0 EQUALITY AND DIVERSITY ISSUES

7.1 The Local Authority must discharge its statutory responsibilities in relation to all schools and settings.

REPORT TO: Schools Forum

DATE: 19 January 2022

REPORTING OFFICER: Nigel Hunt – Pupil Referral Unit

SUBJECT: Bridge School Outreach and Reintegration Service

WARDS: Boroughwide

1.0 PURPOSE OF THE REPORT

1.1 To report to School Forum the outcomes to the Service Level Agreement for The Bridge School Outreach and Reintegration Service. To identify the reasons the SLA should continue for a further two year period.

2.0 RECOMMENDATION: That

- 1) the report be noted; and
- 2) the Board approves the request for an additional two year service level agreement, to operate The Bridge School Outreach and Reintegration Service, at a cost of £131.2K per each year 2022/23 & 2023/24.

3.0 SUPPORTING INFORMATION

3.1 On 26th February 2020, School agreed to release £100K to support the start-up of The Bridge School Outreach Service (now SEMH Outreach and Reintegration Service), and the employment of three staff, to cover roles within this service. On the 16th June 2021, this cost was increased through agreement at Schools Forum, to £125K, in line staffing and overhead costs.

3.2 The purpose of the service is to:

- Reduce mainstream school exclusions at Key Stage 3
- Identify cohorts of students within mainstream schools, who needed additional external support for their social, emotional and mental health difficulties
- Provide a structured equitable pathway, to supporting students in the Pupil Referral Unit
- Promote and ensure high levels of students returning to mainstream schools
- Support the development and implementation of a graduated approach to SEN identification and support
- Reduce costs and pressure on the High Needs Block budget

- 3.3 The service is monitored within a Halton Service Level Agreement that evaluates performance against agreed targets.
The service evaluation is conducted once per school term by Halton's Placements Commissioning team and the SEN Service .
The service to schools commenced on September 1st 2020. The periods of 2020/21 school closures and partial closures due to the Covid pandemic, have interrupted aspects of service continuity and availability, and have impacted outcomes. Although a complete set of successive termly data is not fully available there exists sufficient data to support some evaluations. The evaluations below are a summary provided by the Head Teacher of The Bridge School, the Lead Teacher for the Outreach Service, the Divisional Manager for Placements and Divisional Manager 0-25 Inclusion. The full report is attached as an appendix alongside the Headline Report by the service Lead Teacher.

3.4 **The KPIs for this agreement are as follows –**

- **During the re-engagement programme and for 2 terms afterwards young people's attendance will be above the criteria used to define persistent absence**
This information only became available from July 2021 onwards, as first cohort started in September 2020

Cohort 1: 5 learners: During the Bridge Placement 80% of students had attendance above 90%. Following placement, 4 students experienced exclusion or transition to other settings (two learners were PX'd after two terms back, in their mainstream setting and two learners were considered to be inappropriately placed, and were consequently moved to specialist settings. The fifth learner continues to succeed in the mainstream setting). Three students (60%) presented average attendance below 90% during the return placement in their host school and beyond.

Data for the cohort of Jan-July 2021 (placement ran over two terms, due to lockdown) is as follows: Four learners remain in mainstream; one learner was placed in AP, following a term long managed move to another mainstream setting; Two learners were moved to specialist settings, as it was felt that mainstream could not meet their needs; Two learners were PX'd, following a term back in the mainstream setting. Additional support was offered to staff and learners prior to PX.

Over the first and second cohort, although the cohort number increased from five to nine, the number of PXs (of learner having gone through the Reintegration programme) remained the same, at two.

Of the students who attended the Bridge School in Summer Term 2020-21, 77.7% improved their attendance, compared to their attendance at mainstream before placement.

55.5% of these students achieved 90% attendance or more during their placement at The Bridge School.

We have not had full attendance data for the cohort who returned to mainstream in the Autumn Term 2021-22, as this has not been provided by all schools, although it has been requested.

- **No young person will remain on the re-engagement programme for more than 12 weeks**

This KPI has been fully met to date (*however this has been impacted by the local lockdowns linked to COVID to enable best practice for reintegration to own schools)

- 100% of the young people entering the re-engagement programme will return to their home school either at the 12 week point or prior to it. In exceptional circumstances only the Panel may consider, after evaluation, that a student/YPs needs are deemed too significant to return to mainstream schooling. There will then be a review of the initial referral process, to identify whether the original referral was appropriate.

From the first cohort, who started in September 2020, this KPI was met fully, with all 5 students returning to their host school.

Eight out of nine learners in the second cohort, returned to the mainstream setting, meaning that, out of a full year's cohort of 14 students, 13 returned to their host school. The one student who stayed beyond twelve weeks was allocated specialist provision, reflective of their needs, and remained at The Bridge (on a 1:1 basis), whilst they were transitioned into that setting.

As a total, learners returned to their mainstream settings following 12 week placement in 92.8% of cases.

- **In the 2 terms following re-integration back to the home school, there will be an improvement in the young person's behaviour, regulation, engagement in their learning and in their academic progress, as evidenced by the home school's tracking systems.**

This information only became available from July 2021 onwards, as first cohort started in September 2020.

Outcomes for the first cohort have been outlined above (see first paragraph in 3.4). Data for the second cohort is not yet fully available, as learners have only been back in mainstream for one term. Final data for the second cohort will be available at the end of spring term 2022. Final data for cohort three will be available in July 2022.

- **Following re-integration back to the home school, each young person will have had no further fixed term exclusions, for at least 2 terms, and no permanent exclusion for at least 1 academic year.**

This information only became available from September 2021

onwards as first cohort started in September 2020

One student (20%) had no FTEs following their return to school. One student (20%) was correctly relocated to support care arrangements (LAC).

2 (40%) students from the first cohort were PX'd. One student (20%) was directed to Alternative Provision to maintain their place on the school roll.

So far, the stats for the Jan-July 2021 cohort of nine learners are as follows: Four learners remain in mainstream; three have been placed in specialist settings or alternative provision, due to this being deemed appropriate to their needs; two have been PX'd following one term back in their mainstream setting

- **All schools will make appropriate and timely use of their Core Inclusion Placements and these young people have all been re-integrated back to the home school within the agreed time frame outlined above.**
To date 7 of the 8 schools have made use of at least 1 reintegration placement. The final school has arranged placements for the summer 2022 program.
- **There have been no breaches of the Home School and The Bridge School SLA and the specific stipulations contained with it.**
This KPI has continued to be fully met
- **For at least 1 academic year following re-integration, no young person who has been part of the Core Inclusion programme will have accessed anything other than their home school**
This information will only become available from January 2022 onwards as first cohort started in September 2020 and it's a 12 week programme.

Based on exclusion data, and transition information from students that have taken part in the program, we do know that, so far (December 2021) four out of fourteen YP have not sustained their placement at their host school, due to PX (two after one term, and two after two terms); Four have been transferred to specialist settings or AP (one) to have their needs fully met; Five remain in their mainstream setting.

Statistically speaking, of the first cohort, only 20% remained in the mainstream setting, 40% were PX'd and 40% moved to specialist settings/ AP. For the second cohort, the figures are: 44.44% remained in their mainstream settings; 22.22% were PX'd; 33.3% transitioned to specialist settings/ AP.

- **90% of young people, parents/carers and schools have provided positive feedback as to the impact of the service.**

Schools feedback survey January 2021 for cohort one - feedback within 'Headline data'

Parent/Carers feedback survey January 2021 for cohort one - feedback within 'Headline data'

Young peoples' feedback December 2020 for cohort one - feedback within 'Headline data'

Young peoples' session feedback for cohort on 89% scored across 5 sessions

Survey feedback from September 2021 intake (students, parents/carers and schools):

Learners: 97% positive feedback (When asked if the placement had helped them to develop skills that would help them in mainstream). Learners were asked to give their Outreach mentor sessions a mark out of 10. Averaged student responses gave an overall satisfaction score of 9.5/10.

Parent/ Carers:

When asked the following questions, these were the parent/ carers' responses:

- *'Overall, how satisfied with are you with the Outreach service?'* 100% of parent/carers responded as being 'highly satisfied'.
- *'Were you satisfied with the support your child received from the Outreach mentors?'* 100% of parent/carers responded as being 'highly satisfied'.
- *'Do you feel our service has improved your child's ability to cope in mainstream, 100% of parent/carers responded as being 'highly satisfied'.*
- *'Have you noticed and positive behaviour or attitude changes in your child?'* 100% of parent/carers responded with 'yes'.
- *'Since working with the mentors, has your child had less behaviour incidents?'* 87% of parent/carers responded with 'yes', 17% responded with 'somewhat'

Schools:

When asked the following questions, these were the schools' responses*:

- *'Overall, how satisfied or dissatisfied are you with the Outreach Service?'*
40/% - Very satisfied
60% - Satisfied.
- *'Do you think our service has achieved its intended outcomes, of establishing and removing barriers to learning, and successfully returning learners to their parent school?'*
100%- Yes
- *'Do you think the delivery of our bespoke mentor intervention was successful?'*

- 100%- Yes
- *'Overall, how successful do you think the management of the learners' transition to the Bridge School was?'*
 - 60%- Very Successful
 - 40%- Somewhat successful
- *'Overall, how successful do you think the management of the learner transition back to the parent school from the Bridge School was?'*
 - 80% - Successful
 - 20% - Somewhat successful

(*Five out of six schools, who placed last term, gave a response)

- 3.5 Throughout the period since the service started there has been good engagement from the Outreach Mentors, as well as the Outreach Lead Teacher with most (7 out of 8) of the schools
The feedback from the Young People linked to the work completed by the Outreach Mentors has been continually positive, evidenced through the above feedback.
Feedback from the schools have also been positive, in terms of the impact the service and the support it is having with the Young People, as well as with the practice and teaching, evidenced through the above feedback.

Attendance during the 12 week placement has also been positive. In Term 1 this was 87.4%, in Term 2, and 91%. In Term 3, one learner (CIC, based in Southport) refused to attend the Reintegration programme. Cumulative attendance, including this learner was 81%, when he was discounted from the figures; the cumulative attendance was 88.3%

In summary, from a Commissioning perspective, the service has established itself well, as a different type of local offer and is likely to have led to avoidance of permanent exclusions. Take up of places could have been increased during the first 2 terms be increased within current capacity: In Term 1 this was 31% and subsequently 56% in Term 2 and Term 3 87.5%. However, this is highly likely to be linked to the impact of COVID restrictions and the further embedding of the new service offer. Put another way, in Term 1, five out of sixteen places were filled. In Term 2, the figure was nine out of sixteen and in Term 3, thirteen out of sixteen

- 3.6 Headline data, that is not complete due to Covid, also identifies that for the academic year 2019/20 Permanent Exclusions at KS3 numbered 22. For the complete year (2020/21) the numbers were 3. For the year 2021/22 exclusions are currently 6. Out of the total of 9 PXs at KS3, which have occurred since the team was established, only four were learners who the team had been given the opportunity to work with and who took Reintegration places. The remaining 5 were not known to the service prior to PX.

In 2020-21 there was an 86.4% reduction in PXs on the previous year (2018-19)

In 2021-22, so far, there is a 72.73% reduction in permanent exclusions on the year 2018-19. (There were 16 PXs in autumn term 2018, compared to 6 in autumn term 2021. This first term figure represents a current reduction of 62.5%).

There are wider variables than just the implementation of the Reintegration Placements and Outreach Service but despite some data, the correlation has clear positives, evidenced through the above data. The SEMH Outreach and Reintegration Service is an opportunity to prevent escalation of High Needs costs through permanent exclusions and restricted access back into mainstream provisions.

3.7 The Bridge School is requesting an additional two years extension to the current SLA at a cost of £131.2K for each year (April 1st 2022 to March 31st 2024). It is also requested that the terms of the SLA are reviewed by a small group of Commissioners and stakeholder Head Teachers in order that focused and realistic targets are subsequently maintained to reflect the now established service offer. For the period beyond April 2024 it is requested that the strategic position of the Outreach and Reintegration Service is evaluated in line with the local area service offer. The yearly cost rise of £31.2K (additional to the initial £100K in February 2020) is to cover yearly increases staffing costs, and to cover the costs of equipment resourcing, staff training needs, transport fuel costs, management oversight and administration.

Staff wages with on-cost total approximately £253K for two years, with a further £9.2K (over 2 years) specifically requested for the supporting costs (resources, IT, fuel, administration and management oversight, and training). A breakdown of these costs is available on request.

4.0 POLICY IMPLICATIONS

The Bridge School provides a statutory service in terms of educational provision, together with additional support for schools and pupils.

5.0 FINANCIAL IMPLICATIONS

£253,133 to cover staff costs for two years, and support costs of £9.2K.
£262,333 in total for two years based on current costs (£131,166 per year) - £131.2K per year requested.

6.0 RISK ANALYSIS

Failure to provide services through The Bridge would result in statutory duties being unfulfilled.

7.0 EQUALITY AND DIVERSITY ISSUES

None.

8.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

9.1 None under the meaning of the Act.

Reintegration Service update

Service impact: the first 14 months

1. All eight partner school are now engaged with the Outreach Team and have a full understanding of the framework re submission of evidence, placement and transition/ reintegration. Meetings have been held with Sandymoor School, but they are not anticipated to place with us until summer term 2022.
2. Cohort numbers and engagement with the programme have increased steadily over the last 12 months: 5 learners placed in Term 1, 9 in Terms 2/3 and 13 starters in September 2021. The anticipated intake for January 2022 is 14 learners.
3. PX's at KS3 were significantly lower at the end of the first year (down from 22 in 2018-19, to 3 in 2020-21). There were a number of contributory factors, which supported this drop, other than the existence of the Outreach team and the Reintegration service. However, an illustration of the impact of the team can be seen in the rescinding of two PXs following my intervention. PXs are expected to be higher this academic year, but estimated to come in well below the figures seen in 2018-19.
4. A clear transitional process has been established, both prior to and following placement.
5. Mentors have early involvement with learners on a 1:1 basis. This continues through placement and continues once the learner returns to their parent school.
6. Prior to placements beginning, Bridge School teachers, TAs and keyworkers now receive passports and readiness scales for all learners who enter via the Reintegration pathway (there was obviously issues around ARs entry pathway, which are addressed below). Those documents are developed by staff during the learners' time at The Bridge School and returned, along with other relevant supporting documents to the parent school at the end of placement (see below).
7. Interim progress reports are compiled and distributed to all schools at the halfway point of the placement.
8. Prior to the learner's final two weeks in placement, an End of Placement Report (EOPR) is created. This includes teacher, mentor, keyworker and lead teacher reports and a comprehensive list of strategies which have proven effective whilst the learner was at the Bridge. This is now sent to schools, along with Boxall and Readiness data, a learner passport, a one page strategy sheet and an at-a-glance strategy sheet to be distributed to all staff working with the learner in question. The response to both Interim reports and EOPR documentation has been very positive
9. These are also distributed to parents and discussed in detail at an end of placement transition review, attended by all stakeholders.
10. Prior to placement, an induction meeting is held at the Bridge School. The SLA is signed off at this meeting and the induction packs are handed out to parents/carers.

11. A transition day for new students has been established at The Bridge School and this follows the model of a Year 6 into 7 transition day. Learners returning to mainstream school are offered a bespoke transition process, tailored to their individual needs. This is developed in liaison with the parent school.
12. All schools have clear documentation, outlining what evidence is required in order to access a placement at The Bridge School. This is discussed with school contacts on a regular basis and schools are offered support where necessary.
13. A quality control document has been established and discussed with individual schools, where the quality of schools' submitted evidence is assessed against a list of standards. This then provides a focus for the individual schools and I for improvement. The aim is that, over the next 12 months, the quality of all schools' evidence will improve. The desired outcome is that schools have a clear understanding of what represents good evidence, making the process of gathering evidence less onerous (which will hopefully support continued engagement with the programme). It also means that evidence received will be of a more consistent standards across all schools.
14. Due to the paucity of available EP appointments, I am going to carry out a specialist teacher observation, report and recommendations where an EP report is not available, but placement is considered to be appropriate (schools are currently being offered 9 EP appointments per year, if we were to expect all learner coming onto the programme to have EP reports, we would be asking schools to commit six out of those nine slots to our learners. This isn't feasible, as schools would only be left with one appointment per term for all EHCP applications and Woodview referrals).
15. The Outreach team (in conjunction with the Behaviour Service) has piloted an SEMH surgery at St Chad's School. Following analysis of feedback, it is hoped that all schools can be offered such surgeries, in order to support good practice for learners with SEMH (particularly those who have engaged with then Reintegration programme), support staff to develop quality first teaching strategies for learners with SEMH and, as a by-product, raise the profile of the Outreach Team and Reintegration Service in order to increase take up of strategies. The first step in this process is to establish surgeries in four of the eight schools by the end of the academic year.
16. In the first fourteen months of the service, eighteen learner observations have been carried out, in seven of the eight schools and reports and recommendations /strategies written and submitted for each.
17. In the first three weeks following reintegration, the Outreach Team will hold meetings in all partner schools with staff who will be teaching returning Reintegration learners. Meetings will be learner-specific and their one page profile will be discussed (and updated if required) and teachers will be offered additional strategies if needed.
18. Prior to placement, Mentors meet with mainstream school staff and create Readiness for Reintegration reports and baseline student passports for all incoming learners. These are then passed to Bridge School staff to aid transition. The

documents are updated whilst the learners are at The Bridge and then returned to the mainstream settings along with one page profiles and End of Placement reports, to allow the staff to work more effectively with learners when they return.

Next steps/ Areas to address:

1. Following the recent situation with a CIC placed at The Bridge School, an extra level of scrutiny will be applied to referral documentation, should the following situations arise:
 - The learner having under 70% attendance (not linked to medical issues)
 - The learner having CLA status;
 - The learner living out of borough, but attending a Halton school.
 - The learner having any Community order/ DOLs order etc

In these cases, further details and information will be sought before the referral process can proceed. It is proposed that the referral documentation is amended, where required, to identify said issues at the earliest point possible.

2. Quality of referral documentation will be monitored via the process established in July and schools offered appropriate documented support in order to make improvements where required.
3. MJ to offer schools specialist teacher observations and reports where EP reports are unavailable in order to inform the referral process. This was discussed with HBC before the summer and Rhona Hobson and Vanessa Nice were made aware at the same point.